OSC HR/Payroll Training

**Organizational Management Overview
OM200**

Slide 1

Notes

Welcome to the OSC HR/Payroll *Organizational Management Overview* training. The Organizational Management (OM) module is used to define and maintain org units, job classes, positions, and persons occupying positions. It is based on a concept of creating and linking objects. This in turn establishes relationships and inheritance of attributes.

Welcome and Introductions

Welcome to the *Organizational Management Overview* course.

- Introductions
- Sign-in sheet
- Tent cards
- Restrooms
- Breaks
- Parking Lot
- Classroom etiquette
  - Cell phones off
  - Quiet side conversations

Slide 2

Notes

The course introduction is an opportunity to get to know the others who are attending class as well as to agree on classroom courtesy. The instructor will inform you about the building facilities and when breaks will occur.

Please make sure you receive the credit you deserve for attending class by signing the attendance sheet.
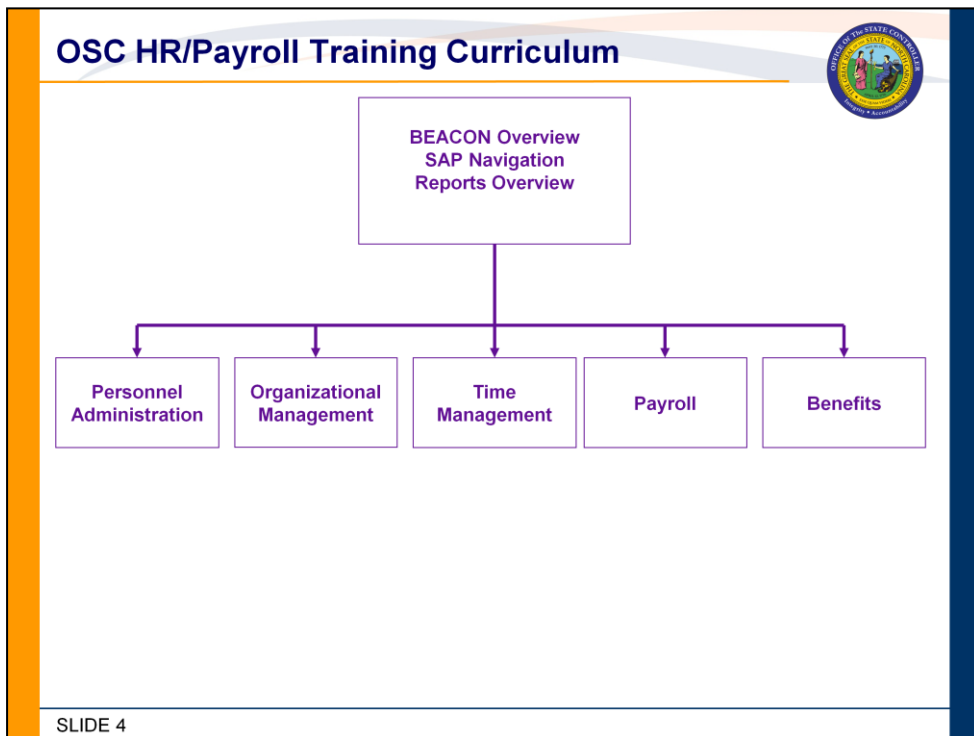
Prerequisites

- Prerequisites
  - BEACON Overview, BC100
  - SAP Basic Navigation, BC110
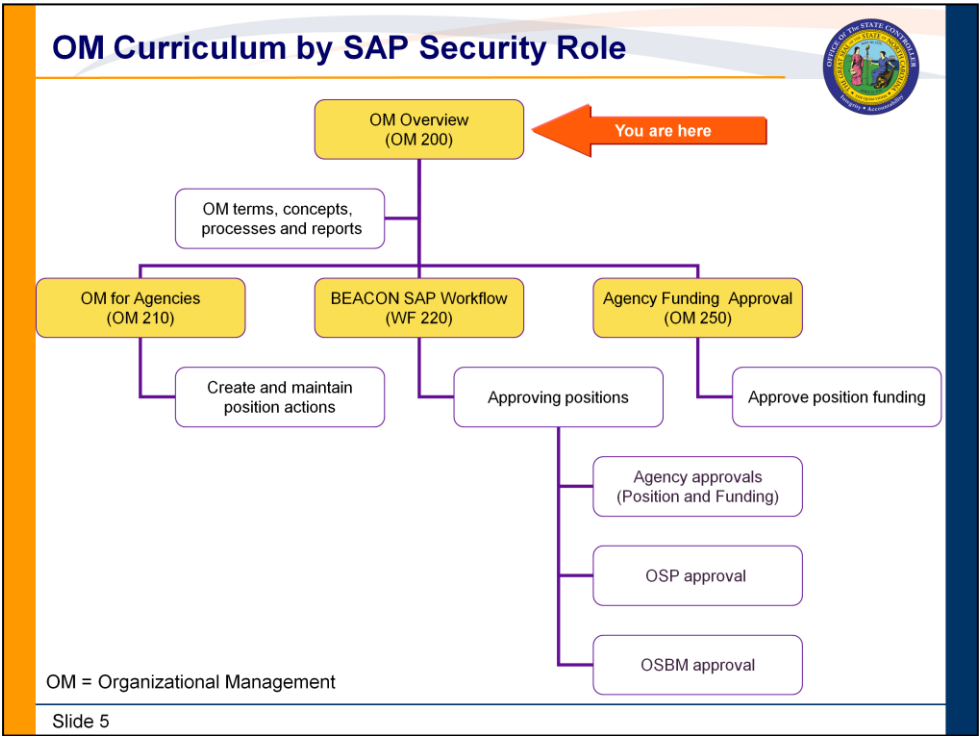 - Personnel Administration Overview, PA200

Slide 3

Notes

This course is for those individuals working at state agencies and BEST Shared Services who have security authorization to display the organizational structure.

Notes

The OSC HR/Payroll training program comprises several courses and different modules. Based on your HR role, you will attend courses in the *Organizational Management* module.

OM Curriculum by SAP Security Role

OM Overview (OM 200) — **You are here**

OM terms, concepts, processes and reports

OM for Agencies (OM 210)

BEACON SAP Workflow (WF 220)

Agency Funding Approval (OM 250)

Create and maintain position actions

Approving positions

Approve position funding

Agency approvals (Position and Funding)

OSP approval

OSBM approval

OM = Organizational Management

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Notes

Course Map – Organizational Management Overview

Lesson 1: PA Overview

Lesson 2: OM Concepts

Lesson 3: Displaying the Organizational Structure

Lesson 4: OM Processes and Reports

Lesson 5: Connecting the OSC HR/Payroll Dots

Lesson 6: Course Review

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Notes

Strategy for Training

- **Tell me** — **Concepts**
  Instructor will discuss the process, responsibilities and describe the transactions – LISTEN

- **Show me** — **Demonstrations**
  Instructor will demonstrate job-related tasks performed in SAP – HANDS OFF

- **Let me** — **Exercises**
  Student will complete the exercises which allows for hands-on practice in class – HANDS ON

- **Support me** — **Availability**
  Instructor will be available to answer questions while the students complete the exercises.

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Notes

The *Organizational Management Overview Student Guide* provides a copy of the PowerPoint presentation used in the classroom training. Observe that space is available for you to write notes. You can use the guide as a reference when you return to the workplace. For example, you can use the exercises for practicing in the SAP training environment.

Reference materials

- Student Guide
- Job Aids
- Other resources
  - Online help
    - Provides step-by-step procedures by screen
    - Includes links to complete step-by-step procedures
  - Work instructions

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Notes

Course Objectives

Upon completion of this course, you should be able to:

- Define Organizational Management (OM)
- Identify components of the OM structure
- Display an organizational structure in SAP
- Identify OM reports
- Connect the OSC HR/Payroll Dots

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Notes

This course is intended to give HR professionals an understanding of SAP's Organizational Management module. This course will provide you with demonstration and practice for displaying the organization and staffing assignment structure.

Course Map – Organizational Management Overview

Lesson 1: PA Overview

Lesson 2: OM Concepts

Lesson 3: Displaying the Organizational Structure

Lesson 4: OM Processes and Reports

Lesson 5: Connecting the OSC HR/Payroll Dots

Lesson 6: Course Review

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Notes

Lesson 1 Objectives

Upon completion of this lesson you should be able to define key Personnel Administration (PA) concepts.

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Notes

This lesson is designed to provide you with general knowledge about Personnel Administration and how to display data.

SAP's Foundational Structures

Display Organizational Assignment (0001)

Slide 12

Notes

Before we explain in more detail the purpose, attributes and relationships of each OM object, it is important to review SAP's foundation data structure for employee master data which is comprised of the **Enterprise Structure** and the **Personnel Structure**. This structure is displayed on the *Organizational Assignment* (0001) infotype. The above slide shows the Organizational Assignment infotype for Patsy Alvarado, a sample employee. Let's take a look at each of the data fields within these two structures.

NOTE: We will review the organizational structure in the next lesson.

Enterprise Structure

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Notes

The Enterprise structure defines the legal structure of the State of North Carolina and is comprised of:

- Company Code
- Personnel Area
- Personnel Sub-Area
- Cost Center
- Business Area
- Fund
- Functional Area

Company Code

- The company code allows for independent accounting.

- Multiple company codes can exist.

Display Organizational Assignment (0001)

Personnel No 80000033   Name   Patsy Alvarado
EEGroup A   SPA Employees   PersA 1601 Environment Natural Resources
EESubgroup A1   FT N-FLSAOT Perm   Statu Active
Start 01/01/2008 to 12/31/9999   Chng 06/09/2008 ECATT

Enterprise structure
CoCode NC01   STATE OF NC
Pers.area 1601   Environment Natural Resour   Subarea AC01   7day Norm
Cost Ctr 1699999999   DENR   Bus. Area 1600   DENR
Fund 169999999   DENR-SUSPENSE

Func. Area 6000000000000001

Personnel structure
EE group A   SPA Employees   Payr.area 01   NC Monthly
EE subgroup A1   FT N-FLSAOT Perm   Contract

Organizational plan
Percentage 100.00
Position 65002441   800904000072
Contracts Administrator
Job key 30000004   Adm Ofr
Administrative Officer II
Org. Unit 20003893   435040000000
ENR SO ASIT Asst Sect
Org.key 16011699999999

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Notes

A **Company Code** is an HR integration point with SAP financial accounting applications and is an integral part of an employee's HR record through the connection with Personnel Administration. The Company Code represents the highest levels of the organizational structure. The State of North Carolina uses two company codes: NC01 and NC02. All agencies use NC01, except for the Department of Transportation and the Employment Security Commission.

NC01 – State of North Carolina - NCAS

NC01 represents primary government agencies and component units which use NCAS (North Carolina Accounting System) as their main accounting system. Until NCAS is replaced, payroll financial postings from company code NC01 will be interfaced to NCAS.

NC02 – State of North Carolina – DOT & ESC

NC02 represents any primary government agency or component unit that does *not* use NCAS as its primary accounting system, but is included in the HR/Payroll project for processing payroll transactions. These agencies or component units have their own accounting system and chart of accounts, and require payroll entries to be interfaced to their accounting systems.

Personnel Area

- Designates specific agency for Payroll
- Related to Company Code
- Assigned at the position level and defaults to the employee's record

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Notes

The **Personnel Area** is tied directly to the Company Code and is used by Payroll to identify the specific agency for whom the employee works. A Company Code can include one or more Personnel Areas. Personnel Area is important for selecting dates for reporting. Personnel areas determine where wages and salaries are posted and from where they are paid. Some examples are:

Company Code NC01

- 1401 State Controller
- 1601 Environmental and Natural Sciences
- Z101 State Personnel
- 8701 School of Science and Math

Company Code NC02

- 1501 Transportation
- 4401 Employment Security Commission

Subarea – Personnel Subarea

The **Personnel Subarea** further defines the Personnel Area. The Personnel Subarea is identified by a four alpha-numeric code and has been designed to identify various working schedules so that Time Management can define groups of specific time entry rules (for example, 7-day schedule; 24/7 etc.). Personnel subarea groups similar jobs to conform to time and attendance rules. There are five key elements that determine an employee's Personnel Subarea assignment:

- Calendar assignment
- Relationship to the state (regular vs. temp vs. elected vs. contractor)
- Quota accrual rules/requirements
- Work schedule rule (to restrict the available work schedules)
- Working period (which defines Overtime period)

See the *Personnel Area and Subarea* (PSA) Job Aid for detailed information concerning the relevant PSAs associated with each Personnel Area.

Job Aids are accessible online at the BEACON University website: **www.BEACON.nc.gov/training/index.html**.

Notes

Notes

The **Cost Center, Fund, and Functional Area** fields default from the Organizational Unit and therefore are grayed out. There is only one Functional Area for the whole *State*. There is only one default Cost Center and one default Fund per *Agency*. Neither the Fund nor the Functional Area are associated with the position.

A **Business Area** is a unit within a company code used by Finance. The Business Area is the lowest level at which a complete set of income statements and balance sheets can be processed. The Business Area represents a separate area of operations or responsibilities within an organization.

In most cases, the Business Area represents an Agency. The exceptions are:

- Justice (SBI)
- HHS (403-b)
- CCPS (Highway Patrol)

Personnel structure

Display Organizational Assignment (0001)

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Notes

The Personnel structure is comprised of:

- Employee Group
- Employee Subgroup
- Payroll Area
- Contract

Notes

In addition to identifying the employment status and the employee's relationship to the State, the **Employee Group** also establishes business rules for calculating leave and personnel calculation rules for managing employee pay. This also provides for benefit eligibility determination in concert with further use in alternative reporting combinations. The table below illustrates just a few examples of the State of North Carolina Employee Groups:

- A – SPA Employee (subject to State Personnel Act)
- B – SPA Law Enforcement (subject to State Personnel Act)
- K – EPA Employees (exempt from State Personnel Act)
- O – Supplemental Staff (temporaries, pick up firefighter, National Guard, contractor, etc).

See the *Employee Groups and Subgroups* Job Aid for detailed information concerning the Employee Group field values.

Employee Subgroup

- Defines employee work status (full time, part time) and the work schedule

- Determines detailed and specific calculation rules for employee pay

- Defines subject or not subject to FLSA Overtime (OT)

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The **Employee Subgroup** defines whether the employee is subject or not subject to the Fair Labor Standards Act (FLSA) overtime, and full-time/part-time status. It is also used to determine other types of Personnel Calculation Rules specific to the combination of groups and sub-groups. The employee subgroup for the Personnel Calculation Rule allows payroll to define different payroll procedures for different employee subgroups. Some examples are:

- A1   FTN-FLSAOT Perm [Full Time Not (subject to) – FLSA Overtime – Permanent]

- B1   FTS-FLSAOT Perm [Full time Subject (to) – FLSA Overtime – Permanent]

- Y8   PTS-FLSAOT Trne [Part-time Subject (to) – FLSA Overtime –Trainee]

There are many combinations of Employee Groups and Subgroups in SAP. If the incorrect Employee Group and Subgroup are entered, it impacts time, work against, dual employment, benefits, and pay. As discussed in PA200, you can continue to see why accuracy is so critical when data is entered.

See the *Employee Groups and Subgroups* Job Aid for details concerning the various groups and subgroup combinations.

The **Payroll Area** is derived from a combination of personnel area, personnel subarea, employee group and employee subgroup. The payroll area determines payroll cycle.

Notes

Payroll Area

- Used as a selection to execute SAP payroll.
- Determines pay period, start date, end date, pay date and payroll frequency.

PAr	Payroll area text
01	NC Monthly
04	NC Biweekly
99	Non-payroll-relevant

- Each employee is assigned a payroll area.

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Notes

Payroll accounting is performed for each payroll area.

SAP uses payroll areas to group together employees from whom payroll is run at the same time and also to set the dates for the payroll period.

All temporary positions are in the biweekly cycle!

Work Contract

Affects benefits and identifies employees who are:

- Retiree rehire
- Medicare eligible
- On Short-term disability < 5 years in retirement

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Notes

Benefits adjustments are made as applicable when the Contract field is populated. The Contract field is used to identify employees who meet the following criteria:

- Medicare eligibility – the employee pays an adjusted deduction for the State Health Plan (SHP) because Medicare rates are applied.
- Retiree rehire – an indication of whether the retiree has earning limitations or no limitations.
- Short-term Disability (STD) – used to change the State Health Plan deduction to full employee cost when an employee is out on Short-term Disability leave and has fewer than 5 years of service in the Retirement system.

Medicare eligibility and STD enables the system to collect the correct premium amount for health insurance as well as controlling the cost of SHP.

Retiree rehire earning limitations are used to report to ORBIT employees who are subject to earning limitations.

Knowledge Check – Lesson 1

T	F	Question
		1. The Employee Subgroup arranges employees by their type of status and establishes business rules for calculating leave.
		2. The Employee Group defines more detailed and specific processing for payroll calculation rules, for example, if employee is subject or not subject to FLSA.
		3. The Payroll Area describes the pay frequency and payroll cycle for each employee.
		4. The Company Code is the highest level of the company structure as defined by Finance.
		5. The Personnel Area further defines employees in order to identify various working schedules so that Time Management can define groups of specific time entry rules.
		6. The Personnel Subarea is used to identify the specific agency for whom the employee works.

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Notes

Lesson 1 Review

In this lesson, you learned to identify and define basic SAP Personnel Administration (PA) concepts.

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Notes

Course Map – Organizational Management Overview

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Lesson 6: Course Review
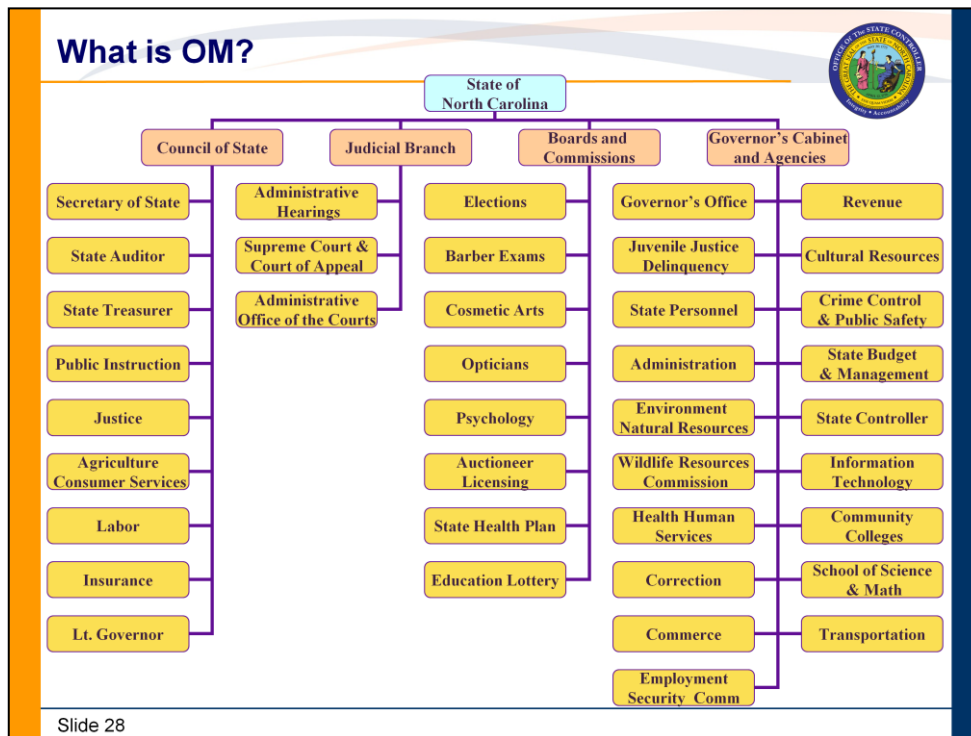
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Notes

Lesson 2 Objectives

Upon completing this lesson, you should be able to:

- Define key concepts of Organizational Management (OM)
- Define key terms related to OM
- Identify components of the OM Structure
- Describe the difference between a job and a position

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Notes

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Notes

OM is a component within the HR Module that maintains a model of the State of North Carolina's organizational structure. The OM module provides a clear picture of the organization at any point in time: past, present or future. This information allows an organization to be proactive in planning for future human resource needs.

- OM is used to set up organizational and reporting hierarchy.
- OM uses relationships to manage the display of data.
- OM is used to construct and maintain an enterprise organizational chart.
- OM groups employees by function / business unit / geographical area.
- OM defines the cost distribution and salary for each position.
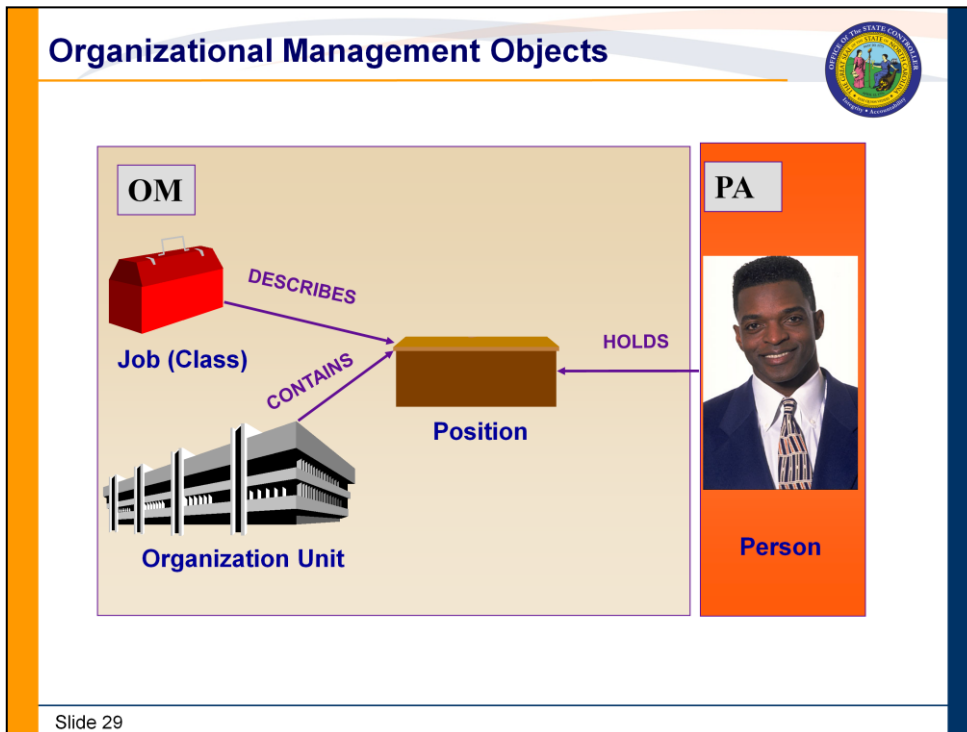
Organizational Management Objects

OM

Job (Class)

DESCRIBES

CONTAINS

Organization Unit

Position

HOLDS

PA

Person

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Notes

Organizational Management is based on the concept that each element in an organization represents a stand-alone object with individual characteristics. These objects are created and maintained separately, then linked together through relationships.

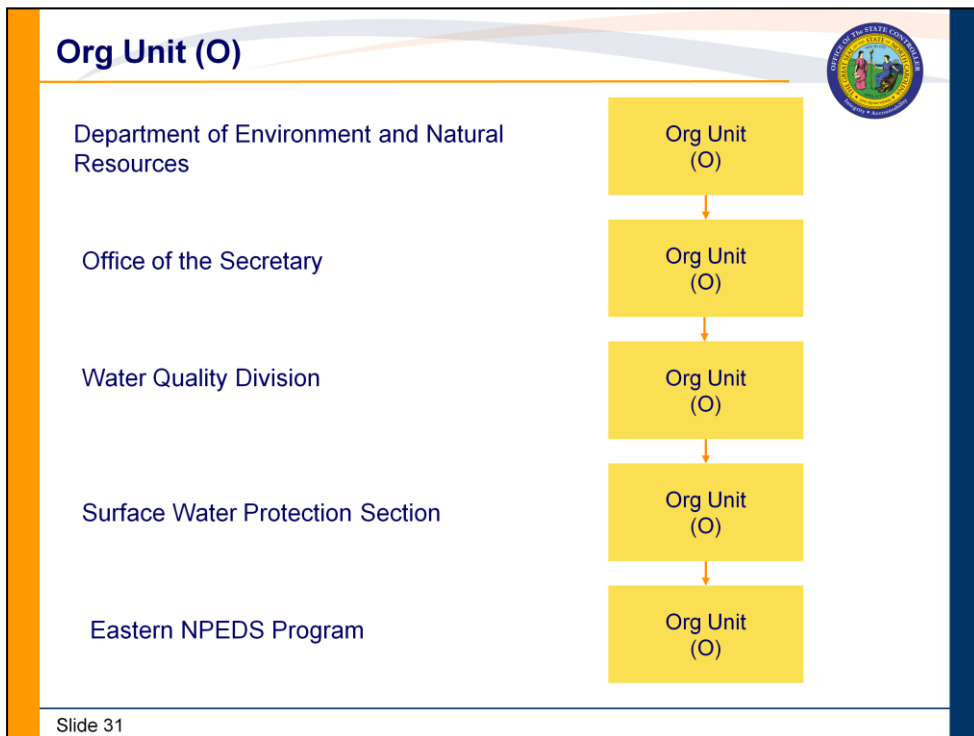**Relationships of OM Objects**

Slide 30
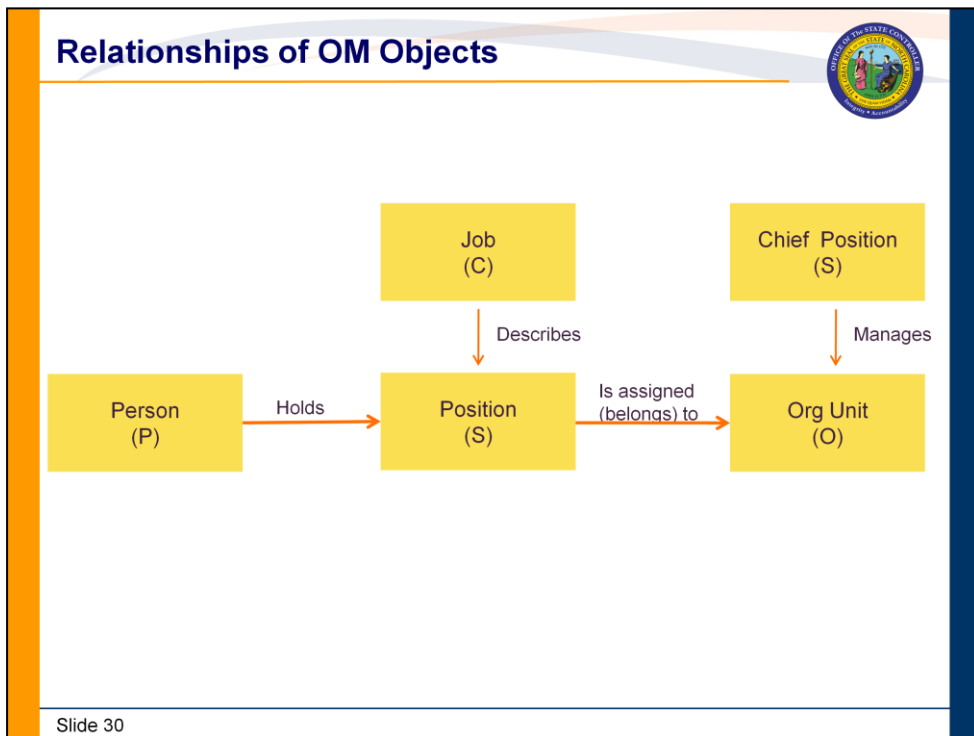
Notes

The primary elements that comprise an organizational hierarchy are:

- Organizational Unit (org unit)
- Job
- Position
- Persons
- Cost Centers

Objects have:
- Attributes
- Relationships

You begin with the org unit. Within the org unit, a position is created. The position is linked to a job. A person fills the position.

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The SAP code for an org unit is "O".

An Organizational Unit (org unit) is the functional unit of the State of North Carolina (or any organization).

An org unit can be the State of North Carolina, agencies/departments, divisions, sections, branches, work groups or units throughout the organization.

An org unit number is eight digits long and begins with a "2".

Org units are linked together to represent the organization charts.

An unlimited number of org units can be created within an organizational plan.

Relationships between org units are identified to determine the hierarchy within the organizational structure.

Org units are defined by agency/department.

Org units are maintained by OM Administrator at BEST Shared Services.

Notes

Position (S)

A Position
- Belongs to an org unit
- Represents a set of tasks performed by a person
- May be classified as Chief position
- May be vacant or occupied by persons (employees)
- A number of positions are based on the same job
- As a rule, each position represents one employee

Position

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Notes

The SAP code for a Position is "S".

The position number is assigned sequentially by SAP.
Therefore there is no logic to the number assignment.

The position number is eight digits long and begins with a "6".

The formal relationships between positions is used to build the **Reporting Structure**.

Notes

Relationships of OM Objects

Position (S) — Is assigned (belongs) to → Org Unit (O)

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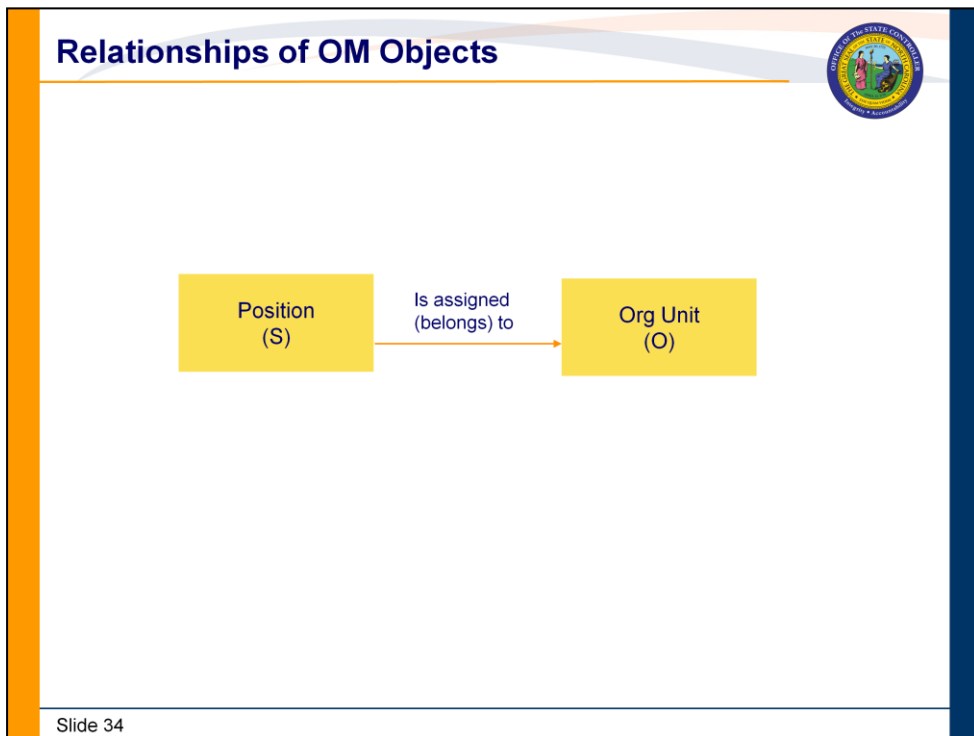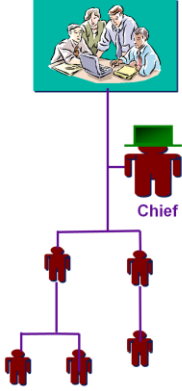
Notes

A Position belongs to an Org Unit.

An Org Unit incorporates a Position.

Positions inherit attributes of a job and specific classifications of work duties are appended.

Chief Position

- Manages the org unit and any subordinate org units
- One Chief per org unit
- Can be the Chief of multiple org units

Chief

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Notes

Some positions are designated as Chief positions to indicate span of control.

An org unit *is managed by* one position (a chief or manager).

Job (C)

- Describes the general classification of functions and duties that are identical across the State
- Is not occupied by persons (employees)
- Is used as the basis for creating positions (Multiple positions can be described by one job)
- Defines EEO, job group and census codes
- Is defined and created by OSP
- Maintained in SAP by OM Administrator
- Is part of a Job Branch which is part of a Job Family

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Notes

The SAP code for a job is "C".

A Job is the foundation from which positions are created.

A Job is a general *classification* of duties and attributes.

Typical attributes are: function, Job Family, FLSA status and role. One Job can be used to create many positions. A Job is identified by a unique number.

When you hear the term *class* or *classification* you will immediately know that a job is being referenced. Of course, the converse is also true—when you hear job, you will know it is a *class*.

A job number is eight digits long and begins with a "3".

Relationships of OM Objects

Slide 37
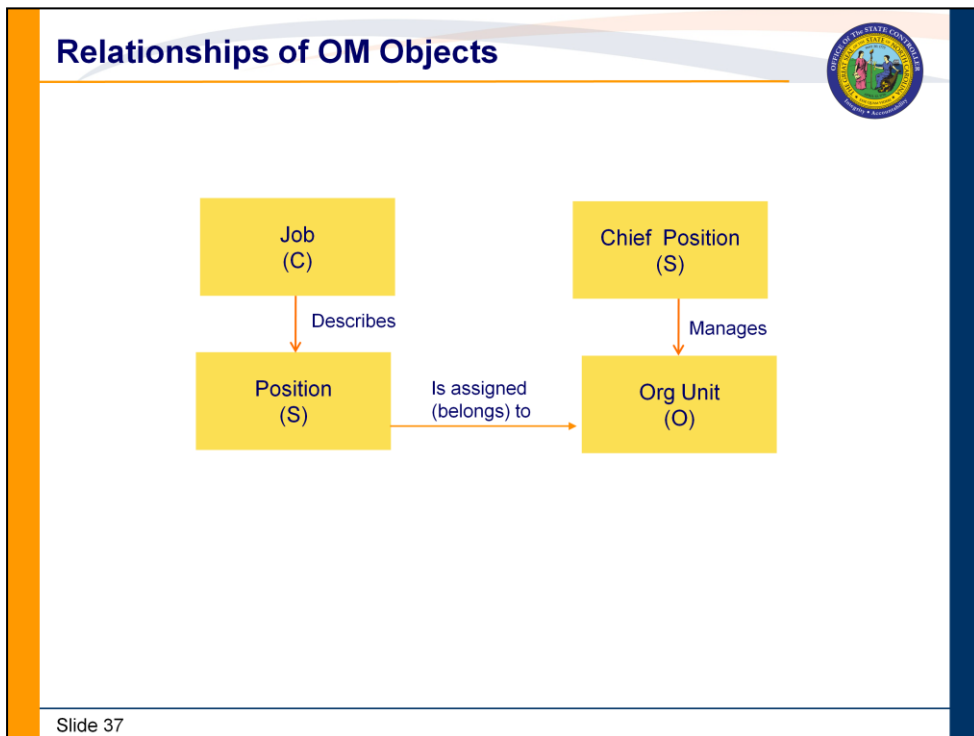
A job is a class.

Jobs are general classifications of tasks routinely performed together and is the template from which positions are created.

A Position inherits attributes of a job.

Notes

Job versus Position

Job

- Defines general classification of functions and duties that are identical across the State
- Has a one to many ratio to positions
- Defines EEO, Job Group and Census Codes
- Is not held by a person (employee)
- Is the basis for creating positions

Position	65002441	800904000072
		Contracts Administrator
Job key	30000804	Adm Ofr

Position

- Represents specific tasks performed by a person
- Has a many to one ratio to jobs
- Belongs to an org unit
- Inherits attributes from the job and org unit
- Held by a person
- May be classified as Chief position
- Is activated by BEST Shared Services
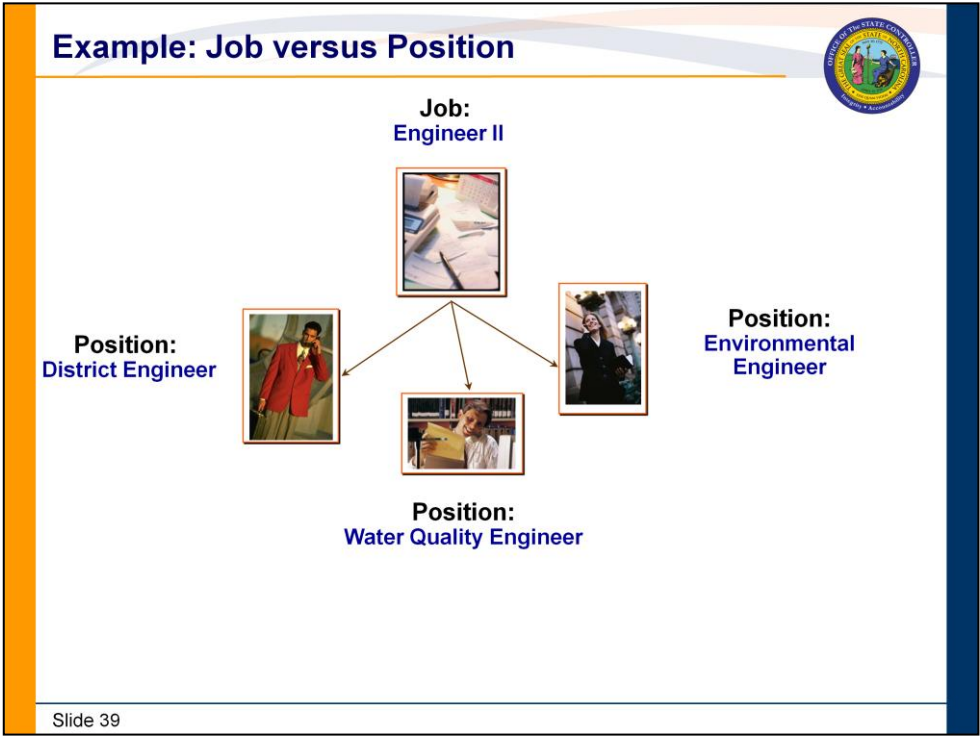
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Notes

In the following example, there may be several different types of Office Assistant (OA) positions in the organization. Each OA position has its own specific tasks and duties; however, some general information is common to all OA positions. For example, the EEO, Job Group, Census Code and some tasks are applicable to all OA positions. This general information is created in the job and then used as a template to create the various OA positions. The specific information pertinent to each OA position is then added at the position level.

Job – Office Assistant

Positions:

- Human Resources Assistant
- Accounting Assistant
- Inventory Assistant

Example: Job versus Position

Job:
Engineer II

Position:
District Engineer

Position:
Environmental Engineer

Position:
Water Quality Engineer

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An example of a Job (class) and its related positions is engineering. There may be several different types of engineers in the organization. Each engineer position has its own specific tasks and duties; however, some general information is common to all engineer positions. That general information is created in the job and then used as a template to create the various engineer positions. The specific information pertinent to each engineer position is then added at the position level.

The relationship between jobs and positions is the same in both graded and banded jobs and positions.
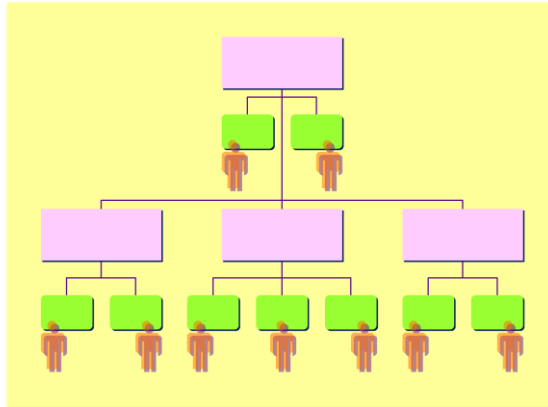
Notes

Official Job (Class) Title	Position (Working) Title
• Engineer (graded)	• Water Quality Engineer • Air Quality Engineer • Building Systems Engineer • County Maintenance Engineer • Elevator Engineer • Environmental Engineer
• Forestry Technician (banded)	• County Ranger • Nursery Technician • District Ranger

Person (P)

- A person is assigned to a position.
- A person inherits the attributes of all related OM objects.
- Personnel data is created and maintained via Personnel Administration by
  - Agency HR
  - Employee Self-Service
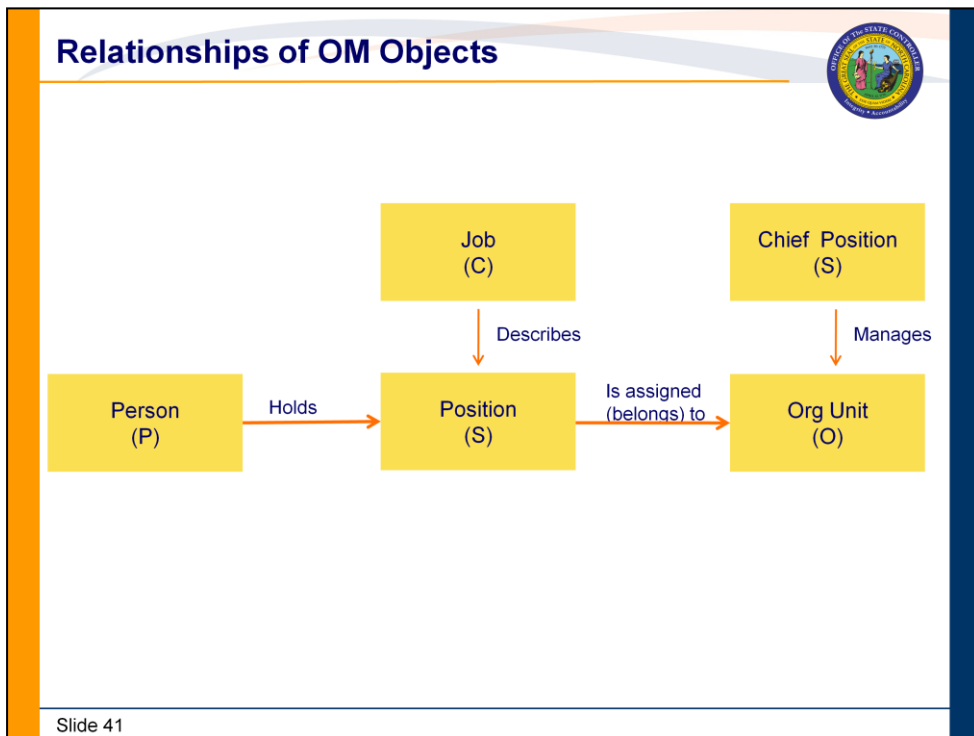 - Manager Self-Service
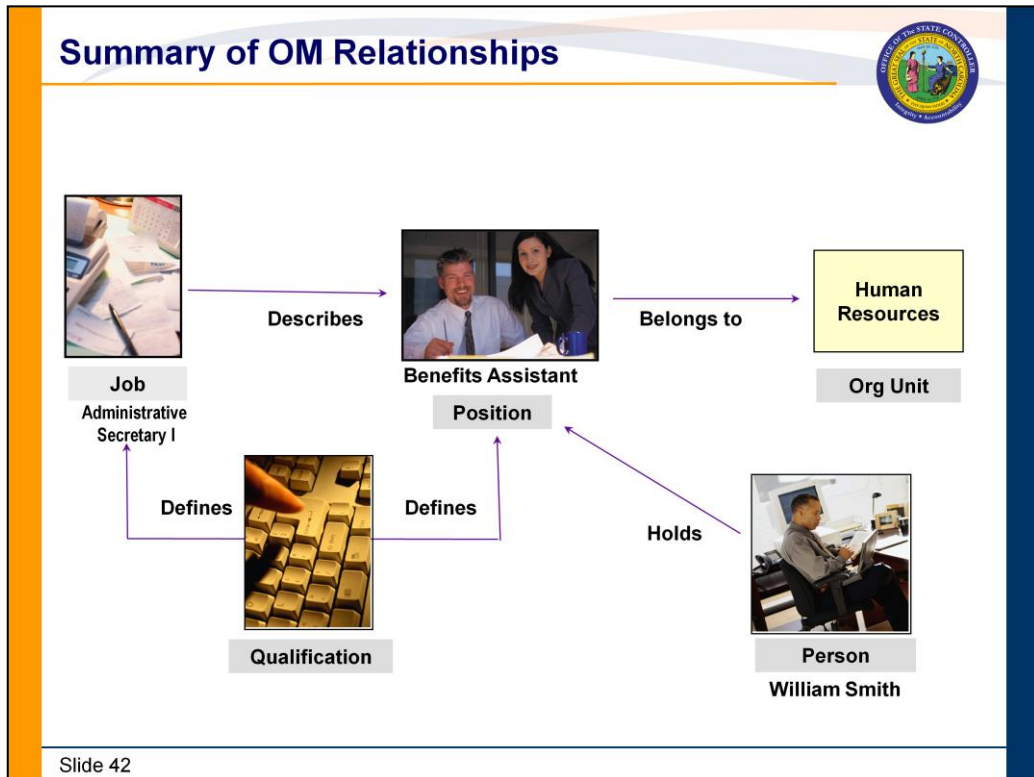 - BEST Shared Services

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Notes

The SAP code for a person is "P".

Persons represent employees and are the central object in the Personnel Administration module. The object Person refers to the physical person who fills a given position.

Relationships of OM Objects

Job (C)		Chief Position (S)

Describes ↓   Manages ↓

| Person (P) | → Holds → | Position (S) | → Is assigned (belongs) to → | Org Unit (O) |

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Persons hold (occupy) positions.

Notes

Notes

Organizational Management is based on the concept that each element in an organization represents a stand-alone object with individual characteristics. These objects are created and maintained separately and then linked together through relationships to form a network which has the flexibility to handle human resources needs.

NOTE: The Qualifications object is currently not being used.

SAP's Foundational Structures

Display Organizational Assignment (0001)

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Notes

In the first lesson, we reviewed the Enterprise and Personnel structures. Now that we understand the purpose of each OM object, let us now review the Organizational structure that is displayed on the *Organizational Assignment* (0001) infotype of an employee's master data record. The above slide shows the Organizational Assignment infotype for Patsy Alvarado, a sample employee. Let's take a look at each of the data fields within this structure.

Organizational Plan

Organizational plan

Percentage	100.00	
Position	65002441	800904000072
		Contracts Administrator
Job key	30000804	Adm Ofr
		Administrative Officer II
Org. Unit	20003893	435040000000
		ENR SO ASIT Asst Sect
Org.key	16011699999999	

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Notes

The Organizational Plan defines the hierarchical relationship between organizational management objects including org units, positions and jobs.

The staffing percentage indicates which percentage of an employee's time is to be spent in the position entered. The **Percentage** will always be 100% and identifies that the employee is working 100% of what he or she was offered and accepted. For example, if an employee accepted a full time position at $48,000 then the employee's percentage will be 100%. By the same token, if a position is going to be shared with two employees each working 20 hours at $20,000 each of the employee's percentage will also be 100% (because each employee is working 100% of what was offered and accepted, which is a 20 hour work week at $20k).

The **Position** displays the Position (working) title.

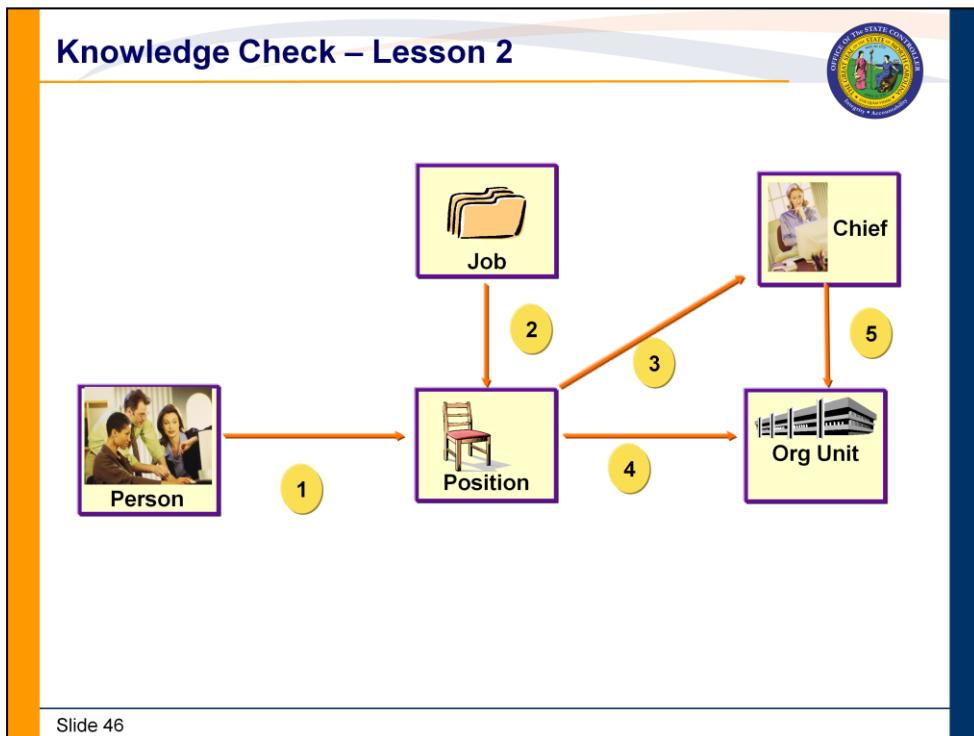The **Job key** represents the Job (class) defined by OSP.

The **Org Unit** represents the agency/department to which the position is assigned.

The **Org key** is a randomly assigned system-generated number.
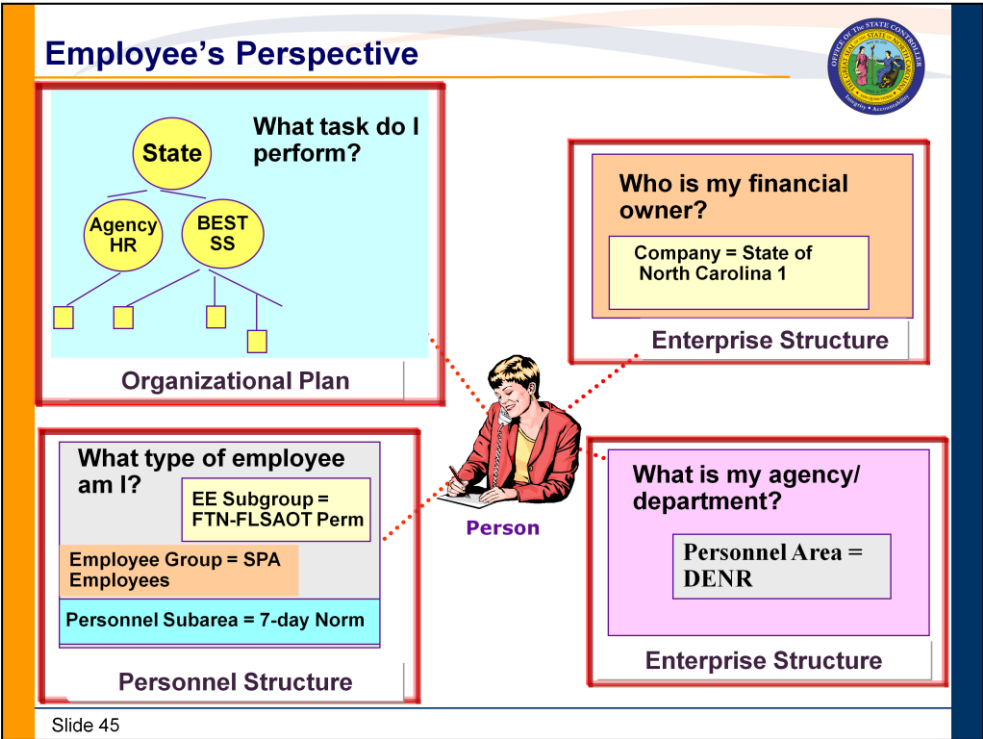
In summary, this slide shows how an employee is related to SAP's Foundation Structures.

Notes

Map each of the following relationship phrases to the correct "to" and "from" arrow:

- Manages
- Is assigned to
- May be designated as
- Describes
- Holds

NOTE: The lines are numbered to help the instructor determine if your responses are correct.

Notes

Lesson 2 Review

In this lesson, you learned to:

- Define key concepts of Organizational Management (OM)
- Define key terms related to OM
- Identify components of the OM Structure
- Describe the difference between a job and a position

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Notes

Course Map – Organizational Management Overview

Lesson 1: PA Overview

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Lesson 3: Displaying the Organizational Structure

Lesson 4: OM Processes and Reports

Lesson 5: Connecting the OSC HR/Payroll Dots

Lesson 6: Course Review

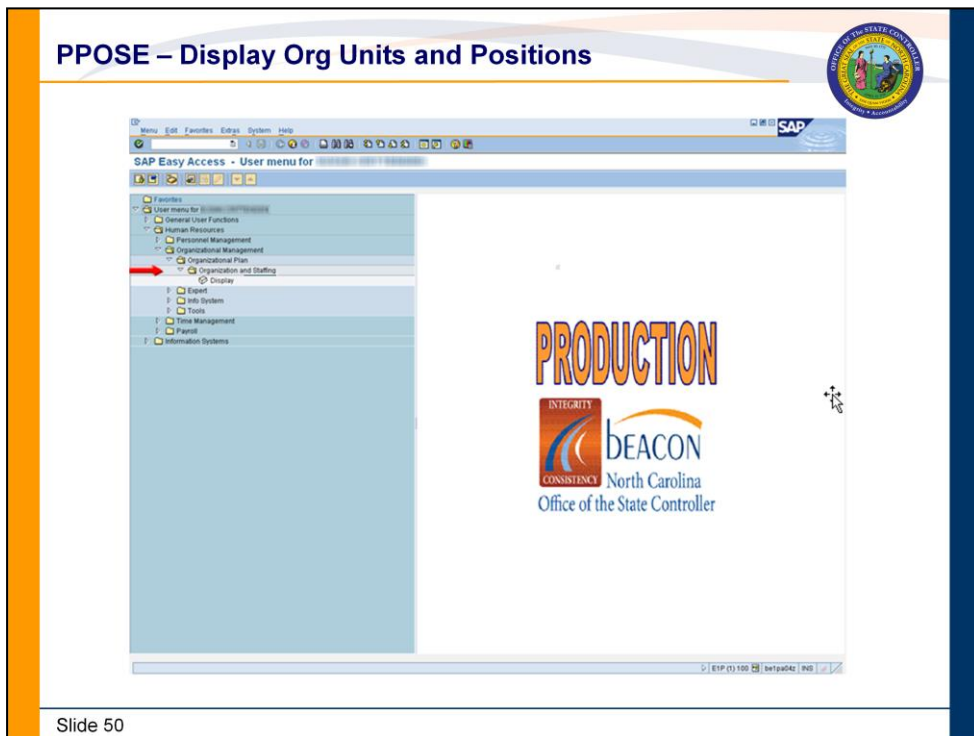Slide 48

Notes

Lesson 3 Objectives

After completing this lesson, you should be able to:

- Display an organizational structure using Organization and Staffing Display or PPOSE
- Explain how to use the Position Overview Screen or ZPOS

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Notes

PPOSE – Display Org Units and Positions

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Notes

The transaction PPOSE – Organization and Staffing Display is used to review org units and positions in an organization. An organizational plan can be made with many object types, although these three basic object types are the building blocks:

- Org Units
- Positions
- Persons (Persons hold positions that are defined by jobs.)

OM200 - Organizational Management Overview

Using PPOSE

- Organization and Staffing Display transaction can be used to view the existing organizational structure.
- Within Organization & Staffing Display, you can:
  - Display org units
  - Display positions
  - Identify "Chiefs"
  - Display holders of positions

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Notes

The PPOSE transaction can be used to display the State's organizational structure and all the elements included in the structure, including org units, positions, jobs and people. You can also use this transaction to find a position number, which is required to complete personnel actions such as new hire.

You access Organizational & Staffing Display by one of the following methods:

- The Easy Access menu: *Human Resources > Organizational Management > Organizational Plan > Organization and Staffing > Display*
- The shortcut T-code is *PPOSE.*

NOTE: T-code is an abbreviation for transaction code.

3.1 - Exercise – Logging on to SAP

Follow along with your instructor and use the steps and data presented below to log on to SAP in the classroom.

- Access the SAP portal Training web page:
  https://trg-mybeacon.its.state.nc.us
- Enter the User ID and password that is assigned to your classroom PC.
- Click on the Log on button.
- Click Yes to confirm the security message displayed.
- Click on the SAP GUI tab.
- Click on the training client specified by your instructor.
- Stop when you have reached the SAP Easy Access screen.

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Notes

3.2 - Instructor Demonstration

- Display Organizational Structure
  - Perform this transaction to display an organizational structure of org units, which represent the divisions, sections, work groups etc. in your agency or department.
  - Information:
    - Org Unit – Office of State Controller
    - Staff assignment
      - Chief position
      - Positions
        » Occupied
        » Vacant
      - Persons (Holders of positions)

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Notes

NOTE: To display the transaction codes in the menu structure, select the **Extras > Settings > Display technical names** menu option.

1. Select the menu path or type **PPOSE** in the command line of the SAP Easy Access screen and then press Enter.

2. In the **Find by** box, click on the nodes by "Organizational Unit".
   ▷ ☐ Organizational unit

3. Click on **Structure Search**. This will display one or more org units in the bottom left box on the screen (depending on the org units with which you have authority to work).

4. Click on the nodes to find the org unit you desire to view.

   State of North Carolina ➔ Governor's Cabinet & Agencies ➔ State Controller ➔ Office of the State Controller

5. Double-click the selected org unit to display a list of positions assigned to the org unit. This structure will be displayed on the upper right side of the screen.

6. Click on the **Column Configuration** [icon] icon and then select additional information to be displayed for each position or holder. Select as a minimum:
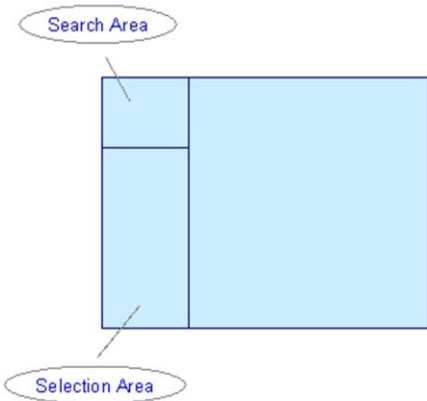
   ☑ Code
   ☑ ID   ║   ☑ Chief   and then click ✔ .

7. Click on the nodes by any position title to view the employee assigned to the position.

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Notes

To hide or show the object manager, select the *Settings* menu option.

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Notes

This transaction allows the user to display the existing organizational structure in a graphical view.

A - Search Area - The Search Area allows users to search for organizational information based on:

- Org Unit
- Position
- Job
- Person

B - Selection Area - The results of searches performed in the Search Area are displayed directly below the Selection Area. You can modify the search results by sorting or filtering. You can add and delete columns to easily find the object. Once the user selects an item from the Selection Area, the results are displayed in the Overview and Details Area.

Organization & Staffing Display Screen Layout (con't)
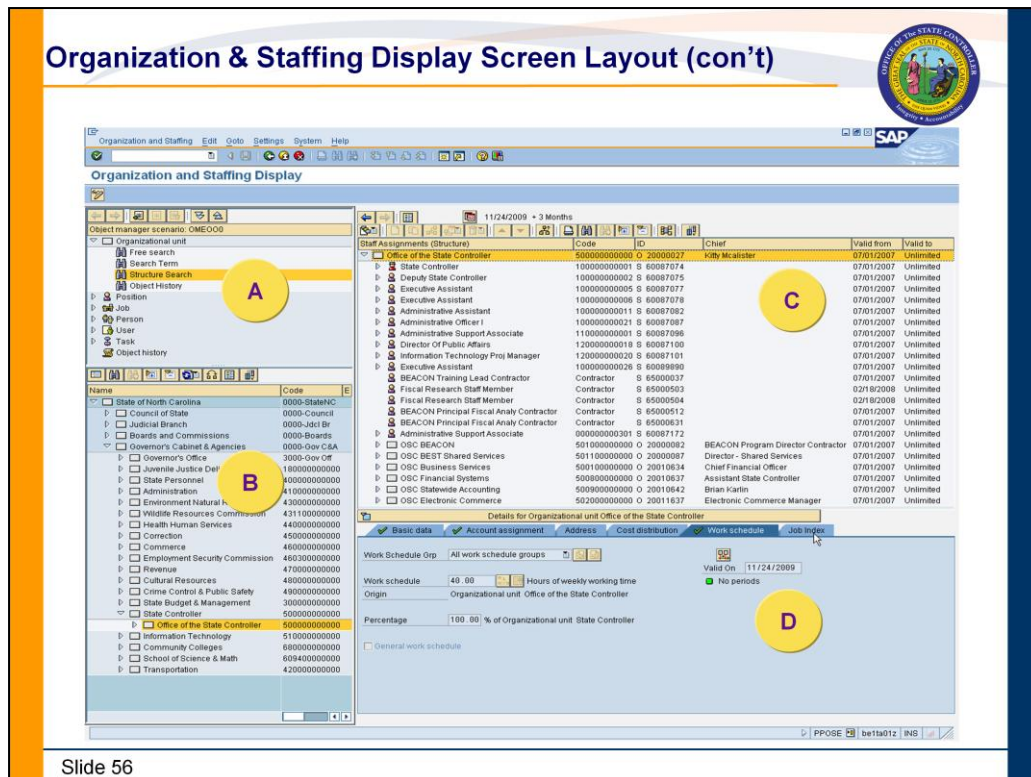
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Notes

C - Overview Area - The Overview Area lists the:

- Organizational Structure
- Code
- ID
- Relationship
- Chief position
- Valid from and Valid to
- Assigned as of
- Assigned until

When the user selects items on the Overview Area, for example, selecting an org unit, the details for that selection display directly below the Overview Area in the Details Area.

D - Details Area - The Details Area lists the:

- Basic Data
- Account Assignment
- Cost Distribution

The Details Area displays more information about the object selected in the Overview Area. The name of the tabs change depending on the object type highlighted in the Overview Area.

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1. Type **PPOSE** in the Command field on the Easy Access screen and click or press Enter.

2. At the Organization and Staffing Display, select the **Organization Unit** node.

3. Select **Structure Search** in the Search Area.

4. Click the node for the **State of North Carolina** in the Selection Area.

5. Click the node for the **Governor's Cabinet & Agencies**.

6. Click the node for the **State Controller**.

7. Double-click the **Office of the State Controller**.

   Questions:

   a) What is the org unit number of the Office of the State Controller?

   b) How many org units report directly to the Office of the State Controller's org unit?

   c) How many positions report directly to the State Controller ?

   d) What is the title of the position that manages the Office of the State Controller org unit? How do you know?

   e) If you want to see the org units that report to the Commerce org unit, how would you do that?

8. Ensure that you have selected the top line. Use the **Collapse icon** in the <u>Overview</u> section to close all of the org units.

9. Ensure that you have selected the top line. Use the **Collapse icon** in the <u>Selection</u> section to collapse all of the org units.

3.4 - Instructor Demonstration

Display Org Unit Details
- Perform this transaction to display the master data details for an org unit.
- Information:
  - Org Unit – Office of the State Controller
    - OSC Statewide Accounting
      - » OSC STWD ACCT Risk Mitigation Section

NOTE: The details are different for each OM object (org unit, position, and job).

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Notes

In a moment your instructor will demonstrate how to display the details for an org unit. Please refer to the next five pages of your student guide and follow along while your instructor demonstrates and explains each tab.

Org Unit Conventions

Short Description

Staff Assignments (Structure)		Code	ID
▽ ☐ Office of the State Controller		500000000000	O 20000027
▷ 👤 State Controller		100000000001	S 60087074
▷ 👤 Deputy State Controller		100000000002	S 60087075
▷ 👤 Executive Assistant		100000000005	S 60087077
▷ 👤 Executive Assistant		100000000006	S 60087078
▷ 👤 Administrative Assistant		100000000011	S 60087082
▷ 👤 Administrative Officer I		100000000021	S 60087087
▷ 👤 Administrative Support Associate		110000000001	S 60087096
▷ 👤 Director Of Public Affairs		120000000018	S 60087100
▷ 👤 Information Technology Proj Manager		120000000020	S 60087101
▷ 👤 Executive Assistant		100000000026	S 60089890
👤 BEACON Training Lead Contractor		Contractor	S 65000037
👤 Fiscal Research Staff Member		Contractor	S 65000503
👤 Fiscal Research Staff Member		Contractor	S 65000504
👤 BEACON Principal Fiscal Analy Contractor		Contractor	S 65000512
👤 BEACON Principal Fiscal Analy Contractor		Contractor	S 65000631
▷ 👤 Administrative Support Associate		000000000301	S 60087172
▷ ☐ OSC BEACON		501000000000	O 20000082
▷ ☐ OSC BEST Shared Services		501100000000	O 20000087
▷ ☐ OSC Business Services		500100000000	O 20010634
▷ ☐ OSC Financial Systems		500800000000	O 20010637
▽ ☐ OSC Statewide Accounting		500900000000	O 20010642
▷ 👤 Assistant State Controller		900000000096	S 60087144
▷ ☐ OSC STWD ACCT Central Compliance		500901000000	O 20010643
▷ ☐ OSC STWD ACCT Accounting & Fin Rprtng		500902000000	O 20010645
▷ ☐ OSC STWD ACCT Fin Research/Analysis		500903000000	O 20010646
▽ ☐ OSC STWD ACCT Risk Mitigation		500904000000	O 20013607
▷ 👤 Osc Risk Mitigation Manager		900000000004	S 60090516
▷ 👤 State Management Analyst		900000000007	S 60090517
▷ 👤 State Management Analyst		900000000008	S 60090518
👤 State Management Analyst		900000000009	S 60090519
👤 State Management Analyst		900000000022	S 60090520
▷ ☐ OSC Electronic Commerce		502000000000	O 20011637

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Notes

The object type for an org unit is "O".

The numeric object ID for an org unit will begin with the number 2.

The twelve-digit code, also referred to as the abbreviation, short-text, or number is logically assigned by the agency.

The forty-character description for the org unit is "smart coded" to facilitate your data searching and reporting. The description will start with the description of its superior (parent) org unit. For example, the Statewide Accounting Division of the State Controller's Office org unit description is O*SC STWD ACCT.* This description includes the description of its parent org by using "OSC" to denote Office of the State Controller. The org unit description is *OSC STWD ACCT Risk Mitigation*. This description includes the two superior org units in its description by using "OSC STWD ACCT" to denote both the Office of the State Controller and the Statewide Accounting Division org units.

Numbering Conventions

Org Units: 20000000 to 29999999

Positions: 60000000 to 69999999

Jobs: 30000000 to 39999999

NOTE: Jobs are not displayed in the org structure on PPOSE.

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Notes

Characteristics for each org unit are stored on tabs in the *Details* section of the *Organization and Staffing Display* screen. Some characteristics of org units are inherited by subordinate org units and positions if they have not been maintained. SAP is using these tabs to define org units:

- Basic data
- Account assignment
- Work schedule

The remaining tabs (address, cost distribution and job index) are not used.

Org Unit Details (Basic data tab)

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Notes

The *Basic data* tab provides org units with a unique identity. In the two *Org Unit* fields, the short and long description for the org unit are displayed. These descriptions are displayed in the organizational structure. The Department indicator is checked for all org units to enable payroll accounting. The employees that hold positions are also displayed in the *Holder* table.

Org Unit Details (Account assignment tab)

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Notes

The *Account assignment* tab specifies the controlling area, master cost center, company code, business area, personnel area and personnel subarea for an org unit. The data is also used as default values in *Personnel Administration*.

Data is inherited by subordinate positions and org units, as long as they have no direct assignment of their own. Inheritance occurs as follows:

- Account assignment features are inherited by subordinate org units and positions if they have not been maintained.
- If account assignment features have been specified for a superior org unit, these are overwritten by entries on the *Account Assignment* tab page for a subordinate org unit.

Notes

The *Work schedule* tab assigns 40 hours as the default general working time for the unit itself and for all objects under it in the organizational structure. The general working time is assigned to all subordinate org units, positions or employee groups if they have no individual working time assignment. Individual working time assignments of subordinate objects override the work schedules they inherit from superior org units. If all positions assigned to an org unit have a different work schedule, then you can change the org unit's work schedule and all positions will then inherit the value.

3.5 - Exercise

- **Display Org Unit Details**
  - In this exercise, you are the HR manager at the Office of the State Controller. The Risk Mitigation org unit was recently created and assigned to the Statewide Accounting Division org unit. The Assistant State Controller has asked you to review the details of the org unit to ensure accuracy. She wants you to check the agency organizational structure to verify that Viola Voigt and Charles Sanders are the holders of State Management Analyst positions.

Instructions -

Hint: You are looking for the OSC STWD ACCT Risk Mitigation org unit that reports directly to *OSC Statewide Accounting*.

Using the steps you learned in exercise 3.2, find the appropriate org unit and answer the questions listed below in the Notes section.

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Find and select the appropriate org unit.

Notes

Questions:

1. Who are the holders of the State Management Analyst positions?

2. In addition to looking in the Overview section, what other section displays holder information and how is it displayed?

3. What position does Ruth Parker hold?

4. Identify the holders of the other State Management Analyst positions.

5. How would you find the work schedule for the org unit? What are the work schedule hours?

* Ensure the top line is selected. Use the Collapse icon in the <u>Overview</u> section to close all of the org units.

* Ensure the top line is selected. Use the Collapse icon in the <u>Selection</u> section to close all of the org units.

3.6 - Instructor Demonstration

Display Position and Person Details

- Perform this transaction to display the master data details for an org unit , position, and person.
- Information:
  - Org unit – OSC STWD ACCT Risk Mitigation
    - OSC Risk Mitigation Manager
      » Ruth Parker

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Notes

In a moment your instructor will demonstrate how to display the details for a position and a person. Please refer to the next nine pages of your student guide and follow along while your instructor demonstrates and explains each tab.

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Notes

Position conventions

The object type for a position is "S".

The object ID number begins with the number six (6).

Position details

Characteristics for each position are stored on tabs in the *Details* section of the *Organization and Staffing Display* screen. Some characteristics of positions are inherited from org units and jobs. SAP is using these tabs to define positions:

- Basic data

- Account Assignment

- Cost Distribution

- Address

- Work Schedule

- EE Group and EE Subgroup

- If applicable, "Comp" tabs when the position is eligible for compensation for overtime, holiday, shift differential, on-call pay, gap hours, extended duty, etc.

- Ref Position Number

- SOC/County Code

- Position Type

Position Details – Basic Data tab

| ✓ Basic data | ✓ Account assignment | ✓ Address | ✓ Cost distribution | ✓ Work schedule | ✓ EE group/subgroup |

Details for Position Osc Risk Mitigation Manager

Position   900000000004 Osc Risk Mitigation Manager
Job   Osc Risk Mitigation Manager   Valid On 12/22/2009
☑ Head of own organizational unit   ⬜ No periods
Staffing status   Vacancy occupied or put on hold
☐ Staff

Holder

Icon	Holder	Percentage	Assigned as	Assig
👥	Ruth Parker	100.00	01/01/2008	Unlim

Description
Subtyp

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Notes

The *Basic Data* tab contains the position name, job information, chief position indicator (to signify if the position is the head of the org unit), and vacancy information.

The *Account Assignment* tab identifies the Personnel Area and Personnel Subarea and also identifies cost objects associated with the org unit.

Notes

Position Details – Cost Distribution tab

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Notes

The *Cost Distribution* tab shows how the position costing is set up to be distributed. This is where you look to see if a position is split funded, denoted by two rows in the table, as shown in the following graphic.

Notes

The *Work Schedule* tab identifies the Employee Group and Employee Subgroup and the work schedule for the selected position.

Position Details – EE group/subgroup tab

Details for Position Osc Risk Mitigation Manager

✓ Account assignment ✓ Address ✓ Cost distribution ✓ Work schedule ✓ EE group/subgroup ✓ OT Comp Time

Valid from 07/01/2007
To 12/31/9999
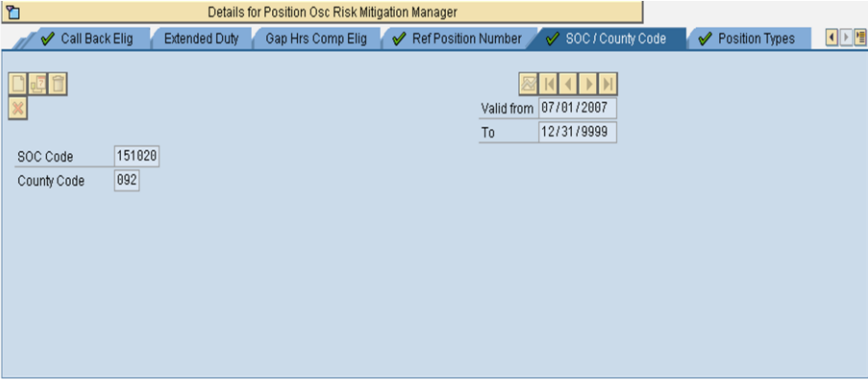
Employee group SPA Employees
Employee subgroup A1 FT N-FLSAOT Perm

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Notes

The *EE Group/Subgroup* tab identifies the Employee Group and Employee Subgroup and the validity period for the selected position.

Notes

The data displayed on the *SOC/County Code* tab is inherited from the job. The Standard Occupational Classification or SOC is used for EEO reporting by OSP. For graded positions, SAP will automatically assign the number. For banded positions, you will be prompted to select the number.

The County Code is used to identify the county in which the position is assigned.

Position Details – Position Types tab

The *Position Types* tab will indicate if the position is classified as emergency, essential, or key.

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Notes

The State has three separate designations for critical positions which are defined as follows:

- *Emergency Position:* A position designated by an agency that is mandatory/essential to agency operations during adverse weather or other conditions of a serious nature that prohibit some employees from reporting to work but do not necessitate the closing of state offices and facilities; or a position designate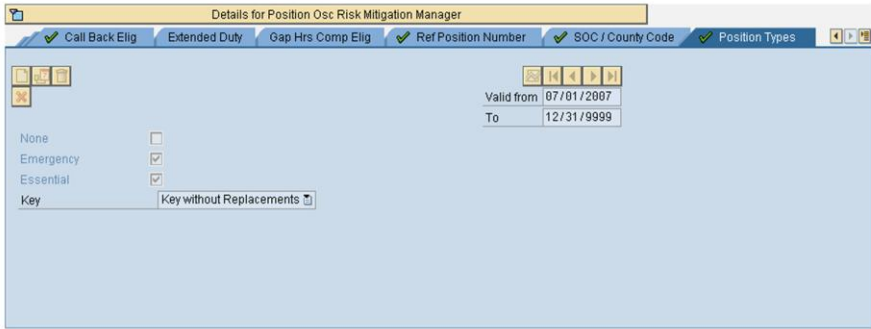d that is mandatory/essential during emergency conditions that necessitate the closing of state offices or curtailing of operations. These designations are related only to the "Adverse Weather and Emergency Closing" policy in the State Personnel Manual.

- *Essential Position:* A position designated by an Executive Branch Department Head with the approval of the Office of State Budget and Management, as exempt from an Executive Order prohibiting the filling of positions. Essential positions include positions directly related to law enforcement and public safety, classroom instruction, and the custody or care of persons for whom the state has a constitutional duty to serve. Administrative and support positions are not deemed essential, but the Office of State Budget and Management may designate additional positions as an Essential Position depending upon the circumstances of each request.

- *Key Position:* A position that requires specialized knowledge that is unique within the organization. The specialized knowledge is essential for the organization to meet the goals and objectives that are linked to its mission or statutory requirements. The loss of an employee in a key position would lead to immediate difficulties in getting the work accomplished.

A position can be designed with more than one type. If no types are applicable, select *None.*

Position Details – Other tabs

- The *Address* tab contains the main address, the mailing address, and a courier address for the position.
- "Comp" tabs - If a position is eligible for additional compensation such as overtime compensation, holiday compensation payout, night shift premium, evening shift premium, weekend shift premium, holiday premium rate, on-call pay, callback pay, extended duty and/or gap hours.
- The *Reference Position Number* tab stores the PMIS position number. This tab also stores a reference to an abolished position when the position was created to replace an existing position.

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Notes

Knowledge check:

What does the PMIS Position Number field mean?

Why is the reference position number field blank?

Details for Position Osc Risk Mitigation Manager						
On Call Elig/Rate	✓ Call Back Elig	Extended Duty	Gap Hrs Comp Elig	✓ Ref Position Number	✓ SOC / County Code	

Valid from 07/01/2007
To 12/31/9999

PMIS Position Number   5009-0000-0000-0C
Reference Pos Number   0

3.7 - Exercise

- Display Position Details
  - In this exercise, you are the HR manager at the Office of the State Controller. The OSC STWD ACCT Risk Mitigation org unit was recently created. Your agency Personnel Director has asked you for complete details on the OSC Risk Mitigation Manager position assigned to OSC STWD ACCT Risk Mitigation.

- Instructions
  1. Use the Organization and Staffing Display (PPOSE) transaction to complete the exercise scenario in SAP.
  2. Display the org structure down to the Position level of the OSC STWD ACCT Risk Mitigation section of the OSC Statewide Accounting for the Office of the State Controller.
  3. Answer the questions below in the Notes section after completing the org structure display.

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Notes

Use the steps you learned in the previous exercises and find the appropriate org unit. Answer the following questions.

Questions:

1. Is the OSC Risk Mitigation Manager position a newly created position? How do you know?

2. What is the funding source for this position?

3. Who occupies this position?

4. How is the position work schedule assigned? How do you know this information? Could it have been different on this position from the default? If yes, why?

5. What should the *staffing status* indicate? Where did you find this information?

6. What Personnel Area is assigned to the OSC STWD ACCT Risk Mitigation org unit? How did you find this information?

7. Look at the State Management Analyst position **60090519**. Why does this position have a work schedule if it is vacant?

The *Position Overview* screen is a "snapshot" of a position's information.

1. Enter **ZPOS** in the Command field on the Easy Access screen and press the Enter key or click the Enter button .

2. Enter a Position Number. You can enter the 8-digit position number or click the matchcode to perform a search for the position using the organizational structure.

3. The current date defaults into the Selection Date field. The HR user has the option to enter any date that the position has data in the system and for which the user has security access. If you enter a date that is not valid, you receive the message 'No Information for the date Entered'. If you are not authorized, you will receive a message indicating that you do not have authorization.

4. Click the Execute button to perform the transaction.

The *Position Overview* screen will display as of the selection date you entered on the first screen. The Run Date is the current date. The other fields are pulled from existing infotypes.

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Notes

Person conventions

The object type for a person (employee) is "P".

The object ID number is generated by the Retirement System.

Position details

Characteristics for each person are displayed on the *Basic data* tab. This tab shows the job assigned to the position which is held by the employee.

Person Details

Details for Person Ruth Parker

✓ Basic data | Qualification

Position assignment 12/22/2009

Icon	Existence	Position	Job	Organizationa	Valid On 12/22/2009
		Osc Risk Mitigation Manager	Osc Risk Mitigation Manager	OSC STWD A(	🟢 No periods

Personnel No	80000017		Name	Ruth Parker
EEGroup	A	SPA Employees	PersA 1401	State Controller
EESubgroup	A1	FT N-FLSAOT Perm	Statu	Active

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Notes

OM200 - Organizational Management Overview

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Notes

Click the Print button on the Overview Area's toolbar to see a print preview of the structure that you have selected.

Knowledge Check – Lesson 3

Terms	Definitions
	The highest org unit of financial accounting (NC01)
	Defines a specific agency within the State
	The position responsible for managing transactions within an org unit
	Employees - persons are assigned directly to positions which are described by jobs and assigned to an org unit
	Represent any type of organizational entity found in the State and are assigned to cost objects
	Provides a general classification of tasks that are routinely performed together and is used to describe several positions.
	Described by a job and related to an org unit. As a general rule may be held by one person
	A description of the employee's position in the State.
	Provides legal and reporting requirements, including the Company Code, Personnel Area, Personnel Subarea, and Cost Center
	Defines the hierarchical relationship between organizational management objects including org units, jobs, and positions

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Notes

Match the following terms to the definitions listed in this slide.

1. Chief Position
2. Company Code
3. Enterprise Structure
4. Job
5. Org unit
6. Organizational Structure
7. Person or Holder
8. Personnel Area
9. Personnel Structure
10. Position

Lesson 3 Review

In this lesson, you learned how to:

- Display an organizational structure using Organization and Staffing Display or PPOSE
- Explain how to use the Position Overview Screen or ZPOS

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Notes

Course Map – Organizational Management Overview

Lesson 1: PA Overview

Lesson 2: OM Concepts

Lesson 3: Displaying the Organizational Structure

Lesson 4: OM Processes and Reports

Lesson 5: Connecting the OSC HR/Payroll Dots

Lesson 6: Course Review

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Notes

Lesson 4 Objectives

After completing this lesson, you should be able to:

- Identify key user roles and business process partners
- Identify OM reports

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Notes

High-level Overview of OM Processes (1 of 4)

Activity	Agency and Department HR	BEST Shared Services
Organizational processing includes adding, changing, or deleting (delimiting) an org unit.	Submits the approved *Organization Request* form to BEST Shared Services via postal mail, fax, or email.	BEST Rep – Verifies form is legible, from an authorized person, and follows other basic guidelines. Processing and Transactions – Creates, changes or delimits org units in SAP.

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Notes

High-level Overview of OM Processes (2 of 4)

Activity	OSP	BEST Shared Services
Job Processing, includes creating, changing, deleting (delimiting) jobs, branches, and families.	Completes the *Job Request* form. Once all approvals have been obtained, submits form to BEST Shared Services via postal mail, fax, or email.	BEST Rep – Verifies form is legible, from an authorized person, and follows other basic guidelines. Processing and Transactions – Creates, changes or delimits job, branch, and family in SAP.

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Notes

Job Processing

The Office of State Personnel is generally responsible for establishing, revising and maintaining the Classification Plan. For each class established by the State Personnel commission, a class standard is prepared. Standards may be written in several forms. The most frequently used are specifications and benchmarks. In SAP these classifications are referred to as "Jobs".

Jobs are used to describe the duties and responsibilities of positions and serve as descriptions that apply to several positions with similar tasks or characteristics. When a new position is created, it can be related to a *job* that already exists in the SAP system. The position will then automatically inherit the characteristics of the *job*. This relationship will make it easier to create positions that are similar or the same, as it will not be necessary to assign characteristics to each individual position.

High-level Overview of OM Processes (3 of 4)

Activity	Agency and Department HR	Approvers	BEST SS
Position Processing	• Agency HR professional initiates action • OM Position Requestor processes position action in planned status in SAP • OM Position Requestor initiates workflow approvals	If required the following approvals occur • Agency Salary Control Officer (Agency Position Funding Approver) approves the actions after entering the cost distribution and position salary or rejects the actions. • If needed, the OSBM Position Funding HR approves or rejects position action. (This is necessary for all new positions and reestablished positions.) • If needed, the OSP Position approver approves or rejects position action. • Agency Position approver approves or rejects the position action.	BEST Rep – Upon final approval notified by Workflow converts position action to active status in the SAP system. **NOTE**: SAP will automatically send a record of the action to the Salary Control System for necessary updates and reporting.

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Notes

High-level Overview of OM Processes (4 of 4)

Activity	Agency and Department HR	BEST Shared Services
Position Vacancy Posting process.	Provide paper document on position vacancy posting to BEST Shared Services	Post position vacancies for small agencies
Legislative Increases		SAP Production Support team will process requests
Mass edit of budgeted positions		SAP Production Support team will process requests
Work Against		SAP Production Support team will process requests

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Notes

Position Actions (1 of 2)

Action	Reason	Remarks
Fund/ New Position Re-Establish Position		Fund Position and New Position (Establish Position) are being combined into one action.
Reallocation Action	•Reallocate – Up •Reallocate – Down •Reallocate – Horizontal •Adjustment from Auth •Reallocate – Differential •Remove Differential	A Reallocation is a change in the job classification of a position. The position salary might also change on a reallocation.
Position Abolished		Delimit the position.
Position Transfer		Position transfer is the movement of a position from one org unit to another.

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Notes

Position Actions (2 of 2)

Action	Reason	Remarks
Position Hours Change		This is a change in the hours of a part-time, less than 40 hours per week position.
Position Type Change	FLSA change Position Type EPA to SPA SPA to EPA Full-Time to Part-Time Part-Time to Full-Time	This is a change in the employee group and employee subgroup that may also change the position from full-time to part-time and vice versa. It may involve a change from time-limited to permanent or from FLSA subject to FLSA non-subject.
County change		You will update county code on IT9022 (**NOTE**: Often the funding changes when the county changes).
Title change		Maintain position title.
Reporting change		Change the relationship (A012) to reflect the new supervisor.

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Notes
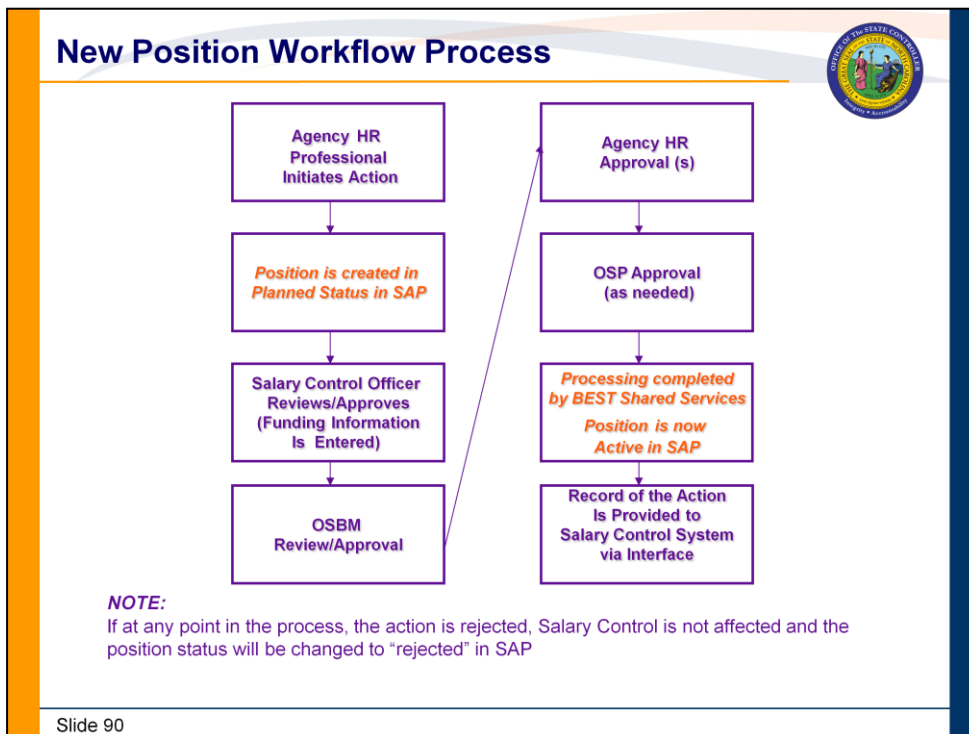
Notes

1. An agency HR professional initiates a request for a new position (Fund and establish position are combined).

   • Position number is created.

   • Job class, title, grade, and org unit are provided.

2. The request is routed to Agency Salary Control Officer, who enters the cost distribution and position salary. The Salary Control Officer then approves or rejects the action.

3. The request is routed to OSBM for approval.

4. The request is routed for all required HR approvals.

5. Upon final approval, the action is active in the SAP system.

6. A record of the action is provided to the Salary Control System for necessary updates and reporting.

OSC HR/Payroll Reporting Solutions

- OM reports that are standard SAP reports are available in SAP system
- OM reports that are customized are available in SAP Business Intelligence (BI) system

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Notes

SUMMARY OF BUSINESS RULES

Users can generate reports in SAP based on their *SAP user profile* and *SAP (security) authorizations* also referred to as HR security roles or process roles. Some data is protected from view by authorizations, such as salary data, meaning that only users who are allowed to see that specific data will be able to access it.

You will have the opportunity to learn more about navigating in BI by completing the BI Reporting, BC120, online course.

OM Reports for Jobs in SAP (1 of 3)

SAP Transaction Code	Report Group	Report Title
S_AHR_61016497	Job	Existing Jobs
S_AHR_61016491	Job	Existing Org Units
S_AHR_61016498	Job	Job index
S_AHR_61016495	Job	Org. Structure with Persons
S_AHR_61016494	Job	Org. Structure with Positions
S_AHR_61016493	Job	Organizational Structure
S_AHR_61016492	Job	Staff Functions for Org. Unit

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Notes

This slide lists the standard SAP reports for jobs.

Refer to the *OM Reports* available in SAP job aid for more information about each report.

OM Reports for Positions in SAP (2 of 3)

SAP Transaction Code	Report Group	Report Title
S_AHR_61016502	Position	Existing Positions
S_AHR_61018831	Position	Obsolete Positions
S_AHR_61018869	Position	Periods of unoccupied positions
S_AHR_61016513	Position	Reporting Structure with Persons
S_AHR_61016512	Position	Reporting Structure Without Persons
S_AHR_61016503	Position	Staff assignments
S_AHR_61016505	Position	Task Description for Positions
S_AHR_61016509	Position	Vacant/Obsolete Positions

Slide 93

Notes

This slide lists the standard SAP reports for positions.

Refer to the *OM Reports* available in SAP job aid for more information about each report.

General OM Reports in SAP (3 of 3)

SAP Transaction Code	Report Group	Report Title
S_AHR_61016528	General	Structure Display
S_AHR_61016531	General	Display Infotypes
S_AHR_61016532	General	Infotype Reporting

Slide 94

Notes

This slide lists the general standard SAP reports.

Refer to the *OM Reports* available in SAP job aid for more information about each report.

4.1 – Instructor-Led Exercise

Execute the *Job Index* report (S_AHR_61016498)

- Your agency Deputy Director has asked you to run the *Job Index* report to identify all positions attached to the Driver Education Field Supervisor job.

  – INFORMATION (most often required):
    - Job Search – "Driver Ed*"

Slide 95

Notes

Demonstration #4.1: Execute the Job Index report

Menu path:

Human Resources > Organizational Mgmt > Info System > Job > S_AHR_61016498 Job Index

Follow along as your instructor runs the S_AHR_61016498 – Job Index report to identify all positions attached to a particular job.

1. Click the matchcode 🔲 next to the **Job** field.
2. Select **Abbreviation & Name** tab.
3. Type *Driver Ed** in the **Name** field.
4. Click the green checkmark for start search. ✅
5. Select (checkmark)

   ☑ DVR ED FLD S DRIVER EDUCATION FIELD SUPERVISOR   EN 01 C   30001440

6. Click the ✅ for copy.
7. Click the Execute button. 🕐

Your instructor will also demonstrate how you can export the report to Microsoft Excel using the **List > Export > Spreadsheet** menu option.

OM Reports in BI (1 of 2)

B0117	Active Position Counts
B0126	Dashboard: Vacancy Rate
B0029	EEO Planning by Org Structure
B0165	Job Attributes
B0055	Labor Force Trends
B0056	Lapsed Salary
B0063	Legislative Increase by Position
B0070	On-Call Eligibility List
B0071	Organizational Hierarchy
B0077	Position Attributes
B0078	Position Attributes – Dates for Hiring
B0113	Position Changes by Period
B0118	Position Counts Over Time
B0149	Positions by Funding Source

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Notes

In addition to the standard SAP reports, custom reports will be accessible using the BI reporting tool.

Refer to the *OM Reports available in BI* job aid for more information about each planned report.

OM Reports in BI (2 of 2)

B0076	Senate Bill 222 IT Expenditures Report (planned personnel expense by cost center)
B0096	Supervisor/Employee Relationships
B0169	Vacancy History (Last 12 Months)
B0168	Vacancy Postings
B0104	Vacancy Report

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Notes

You will learn how to use the BI reporting tool in the *Reporting Overview and Navigation*, BC120, course.

Refer to the *OM Reports available in BI* job aid for more information about each report.

Lesson 4 Review

In this lesson, you learned to:

- Identify key user roles and business process partners
- Identify OM Reports

Slide 98

Notes

Course Map – Organizational Management Overview

Lesson 1: PA Overview

Lesson 2: OM Concepts

Lesson 3: Displaying the Organizational Structure

Lesson 4: OM Processes and Reports

Lesson 5: Connecting the OSC HR/Payroll Dots

Lesson 6: Course Review

Slide 99

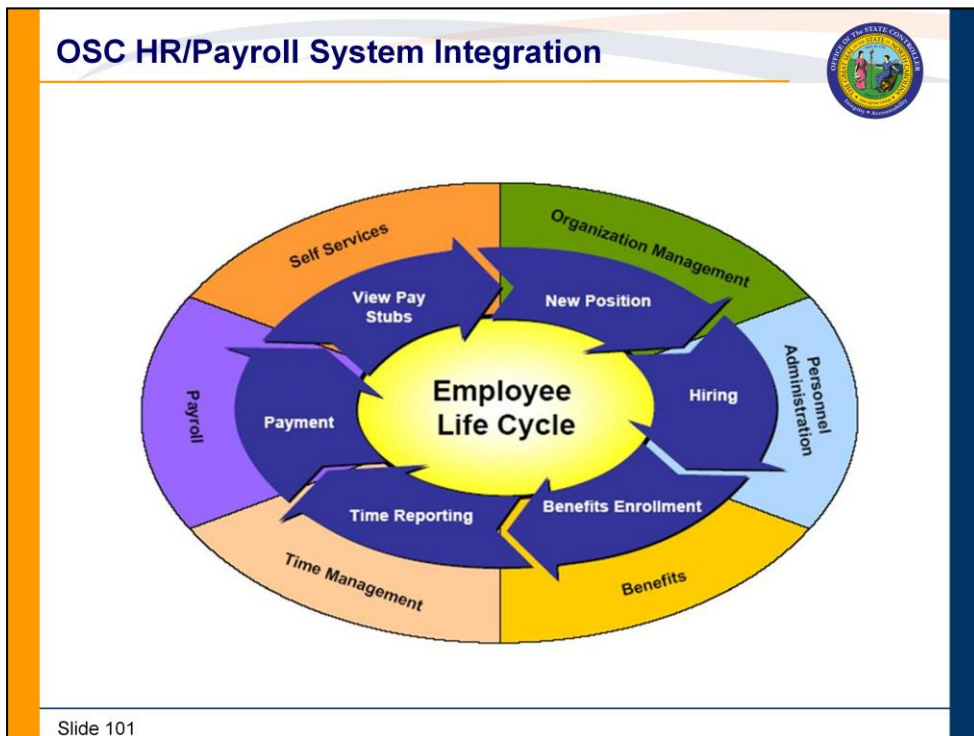**Notes**

Lesson 5 Objectives

After completing this lesson, you should be able to:

- Explain the purpose of the OSC HR/Payroll system integration
- Identify PA infotypes that affect an employee's time, benefits and payroll
- Identify OM settings that affect the position and employee (holder) of the position

Slide 100

Notes

Notes

Because OSC HR/Payroll is an integrated system, entries made in one module affect other system components such as an employee's time, pay and benefits.

Some infotypes entered are tied directly to the employee like work weeks, schedules, addresses, and tax withholding information. Other infotypes are applied to the position and affect things like how OSC HR/Payroll looks at holidays, overtime, and premium pay. OM, PA, BN, and TM settings all can affect an employee's paycheck.

PA Infotypes and Time, Benefits and Payroll

- IT0000 - Actions
- IT0001 – Organizational Assignment
- IT0002 – Personal Data
- IT0006 – Address (permanent)
- IT0007 – Planned Working time
- IT0008 – Basic Pay
- IT0041 – Date Specifications
- IT0552 – Time Specification/Employ. Period
- IT2003 – Substitution
- IT2001 - Absences

Slide 102

Notes

To understand some of the interconnection between OSC HR/Payroll modules, we need to look at how some of the infotypes from one area may affect processing in another. For example, the infotypes listed above are entered in PA, but affect an employee's time, benefits and payroll.

The next few slides give some details on some of these interconnections.

Slide 103

Notes

Time, Payroll and Benefits use information from IT0000 and IT0001.

- **Actions IT (0000)**: Employment status (Active, Inactive, Withdrawn).
- **Org Assignment IT (0001)**: Employee Group, Employee Subgroup, Personnel Area, Personnel Subarea, and Payroll area.

Slide 104

Notes

Personal Data IT0002

Social Security number, date of birth and marital status

Addresses IT0006

Tax infotypes (Residence Tax, Work Tax Area, Unemployment State) are associated with IT0006 – permanent address. If IT0006 is skipped during the New Hire Action, the tax infotypes do not display, and the employee's record will error out in payroll.

If the address information is incorrect:

- a separated employee does not receive his or her final paycheck.
- An employee may not receive W2s at the end of the year.

PA Infotypes and Time, Benefits, Payroll

Create Planned Working Time (0007)

Work Schedule Rule Example (D01N08GN)
- D = Days
- 01 = Schedule number
- N = No weekends
- 08 = Hours per day
- GN = General Schedule (common schedule)

- Weekly working hours drives benefits

Slide 105

Notes

Planned Working Time: The Work Schedule Rule (WSR) is the foundation on which an employee's time is processed in SAP. Each employee is assigned a WSR that best represents his or her work pattern. The WSR combines an assigned holiday calendar (the main State holiday calendar or an alternate calendar approved by OSP) with a repeatable pattern of work representing an employee's scheduled work days and scheduled non-work days. The WSR can represent work patterns repeated over single or multiple weeks and may include day, evening, and night shift designations that trigger premium payments at rates designated for the employee's position (as set for the position in OM).

The WSR does not limit the number of hours an employee may record on any given day, but only allows leave to be taken on scheduled work days. Many fields trigger other time functions. For example, Time Sheet Defaults, IT0315 (from PA20) are directly related to the Time Management Status field on IT0007. A Time Mgmt Status of *1* indicates that a time sheet is required (positive time), and *9* indicates a Time Sheet is not required (negative time). If a negative time employee is on Leave of Absence, IT0007 must be revised to change the employee to positive during the Leave and changed back to negative on Reinstatement.

Negative time employees should be employees who work 5 days a week, 8 hours a day.

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Notes

Example of IT007 Impacts Employee's Pay

This example describes two employees hired on the same day but given two different work schedules. Both employees are paid $6,250 monthly salary.

Employee **A** starts on Sept 19 and is assigned work schedule D01N08GN which has 22 possible work days in the month. Counting Sept. 19th , the employee worked 8 days of the possible 22. The Pay is figured by this formula: 8 days divided by 22 times the monthly rate ($6,250) = $2,272.73 paid for the month for Employee A (based on IT0007 and IT0008).

Employee **B**'s work schedule (D92WVA01) has 16 possible work days in the month. Counting the first day Employee B reported to work (9/19), the employee worked 6 out of the 16 days. The number of days worked (6) divided by the possible work days (16) times the monthly salary ($6,250) calculates a pay of $2,343.75.

You can see that both employees were paid correctly, yet the specific work schedule, and Basic Pay (IT0008), determined two different pay amounts. This shows how schedules entered in PA can affect employee pay. Note that, unless the employee has a significant number of days without pay (A/A Type 9400), this discrepancy would only affect the first and last months that an employee is on a certain schedule.

Notes

Basic Pay: Salary or hourly wages

The **Salary Amount** button does not calculate correctly for DOT employees, but does calculate for all non-DOT wage types. You must manually enter information in the Reason field during the Action. The remaining IT0008 fields default from the PCR for a salaried employee. In the case of an hourly employee, you must enter the hourly wage in the Amount field.

You would seldom make an entry directly on IT0008. Most of the adjustments involving an employee's pay would result from an Action. However, one example of when it is appropriate to make a direct adjustment to IT0008 is when an employee returns to work part-time while receiving partial Worker's Comp.

Slide 108

Notes

Date Specifications IT0041

Time Evaluation bases leave accruals and longevity payments on dates contained on IT0041 so they must be an accurate reflection of the employee's State career. Supplemental Staff employees will not have an IT0041. Initially the Original Hire Date and Agency Hire date are the same. If an employee has a Reinstatement Action (either the employee was on Leave of Absence (LOA) and returned, or left State employment and returned), or Transfer Action, the Agency Hire date will automatically reflect the date of the Reinstatement or Transfer Action.

Time Specification/Employ. Period IT0552

Creditable service earned prior to OSC HR/Payroll must be entered on IT0552. Once an employee is entered into OSC HR/Payroll, the system automatically calculates service and longevity dates using the Time module. If HR makes changes to IT0552 that affect the longevity date, OSC HR/Payroll will take back any money already paid out and repay based on the new longevity date. If you make a change on IT0552, you must email BEST with the name of the employee. Do not adjust the original IT0552 entry from conversion. If an employee has creditable service from more than one organization, enter additional IT0552s to add the additional organizations, rather than extending the date on the original IT0552 to include the additional service dates.

Slide 109
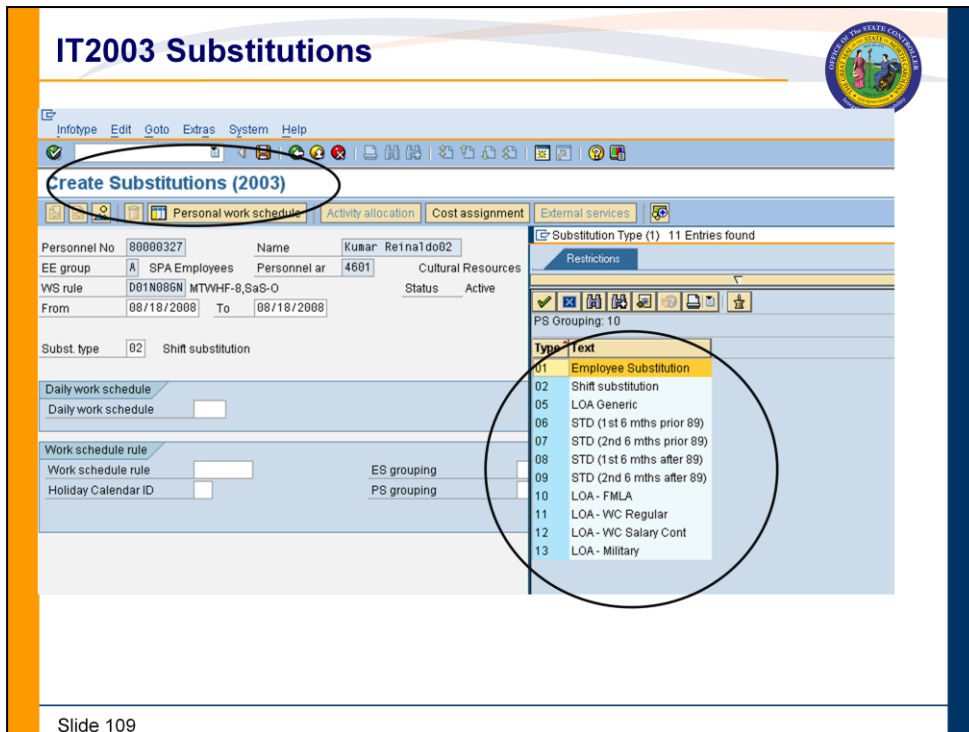
Notes

The Substitutions infotype is used to indicate that the employee is working something other than his or her regular schedule. Substitutions may be daily or for weeks at a time. IT0007 – Planed Working Time is <u>overwritten</u> with the properties of the Substituted schedule. Some examples include:

- An employee is working at a time other than his or her planned work schedule. For example: employee works on day off, or works on a shift that has a different premium (or has no premium) than his or her usual shift.

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Notes

Leave of Absence (LOA) is covered in *PA420 Leave of Absences*, but you should be aware of how the LOA Action affects an employee's time.

Notes

The Absences infotype (IT2001) indicates the number of hours the employee wants to exhaust for leave while on Leave of Absence or the number of hours the employee is taking unpaid leave.

Because OSC HR/Payroll is integrated, the hours entered on the Create Absences infotype are fed directly to payroll. A time sheet does not have to be entered.

As long as the employee is receiving pay (leave or work), benefits continue to be deducted. If not receiving pay, the employee must pay for benefits or discontinue them.

Slide 112

Notes

If the employee is exhausting leave during a time that includes a holiday, additional IT2001 infotypes will be necessary to allow the employee to take holiday leave. For example, assume an employee is going out on military leave on July 1 and wants to exhaust 160 hours vacation prior to beginning the military 30 days. In this scenario, there is one holiday period (7/4). Your entries would be as follows:

1. During the LOA Action, on the Absences (IT2001) infotype subtype 9000, you will enter the dates for the leave to be exhausted **up to** the holiday period in the Start and To fields:

   Start: 7/1/2008   To: 7/3/2008 (24 hours **leave**)

2. Create a PA30 to enter the first holiday period, infotype 2001, subtype 9300:

   Start: 7/4/2008   To: 7/4/2008 (8 hours **holiday**)

3. Create a PA30 to enter the remaining leave, infotype 2001, subtype 9000:

   Start: 7/5/2008   To: 7/28/2008 (136 hours **leave**)

Position Infotypes - Employees and Time

Position flags set on specific infotypes also affect employee time and pay

- Overtime Compensation – IT9005
- Holiday Payout Period – IT9006
- Night Shift Premium – IT9007
- Evening Shift Premium – IT9008
- Weekend Shift Premium – IT9009
- Holiday Premium Rate – IT9010
- On-Call – IT9011
- Callback – IT9012
- Gap Hours – IT9017

Slide 113

Notes

HR personnel with access to PO13 will update the above infotypes for a position. If the position infotypes for the types of pay are not flagged correctly, even if hours are entered, released, and approved, the employee will not receive the correct pay.

If you **revise** a **position** setting that is **retro** to a pay period before the current pay period, you **must contact BEST Payroll** to let them know to run time evaluation on the affected employees retro to that same time period. You only need to contact BEST Payroll if you revise a position. If you revise time for an employee, OSC HR/Payroll automatically runs time eval and adjusts the time records.

NOTE: If a position is revised, an email should be sent to BEST Shared Services. In the subject line, type "Retro Time Evaluation."

In Organizational Management, the infotype codes do not display like they do in PA. To see the infotype number in PO13, select the infotype, and then click the "Activate infotype" button at the top of the screen. The infotype number will display in the message at the bottom of the screen.

Activate Infotype button:

Overtime Compensation

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Overtime Compensation (IT9005)

If time worked beyond the overtime limit (40 hours, etc.) is to be paid or accumulated as compensatory time, the position must have a valid IT9005 record. If overtime compensatory time is to be paid out (FLSA Subject only) or expired (FLSA Not-subject only) at a point earlier than 12 months from when it was earned, the Comp Aging Limit field should be populated with the corresponding number of days (30 days, 60 days, etc.). If it is to be paid out immediately, the Immediate Payout checkbox should be checked. The default is 365 days. The setting on IT9005 works with IT2012 (discussed later) determine the rules for overtime compensation.

As indicated previously, an employee may have worked more than 40 hours and entered and released the time. Even if the time is approved by the manager, if the Overtime Compensation infotype is not flagged correctly for the position, the employee will not receive overtime compensation. An IT9005 record is not required if the position is not eligible for overtime pay or compensation.

Slide 115

Notes

Holiday Payout Period (IT9006)

If holiday compensatory time (equal time off for time worked on a holiday) is to be paid out at a point earlier than 12 months from when it was earned, the Comp Aging Limit field should be populated with the corresponding number of days (30 days, 60 days, etc.). If it is to be paid out immediately, the Immediate Payout checkbox should be checked.

The default is 365 days. If no record exists, the default value of 365 applies.

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Notes

Positions eligible for any of the premiums listed below must have valid infotypes.

Night Shift Premium (IT9007)

OSP approved rates other than the default of 10% must be entered in the Rate field.

Evening Shift Premium (IT9008)

OSP approved rates other than the default of 10% must be entered in the Rate field.
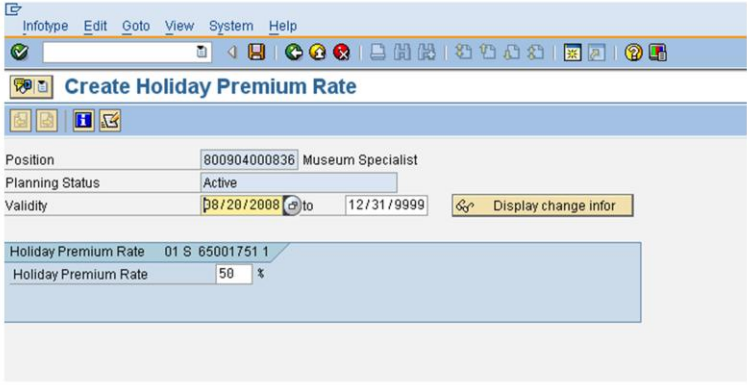
Weekend Shift Premium (IT9009)

OSP approved rates other than the default of 10% must be entered in the Rate field.

The various types of premium pay display as separate line items on the employee's pay stub only if the rates are different. For example, if an employee's evening and night shift are both 10%, the hours worked in the evening and night are together on one *Shift Premium* line item on the pay stub. On the other hand, if the evening rate is 10% and the night is 15%, two separate line items will show with the hours entered for the evening separate from the hours entered for night.

Slide 117

Notes
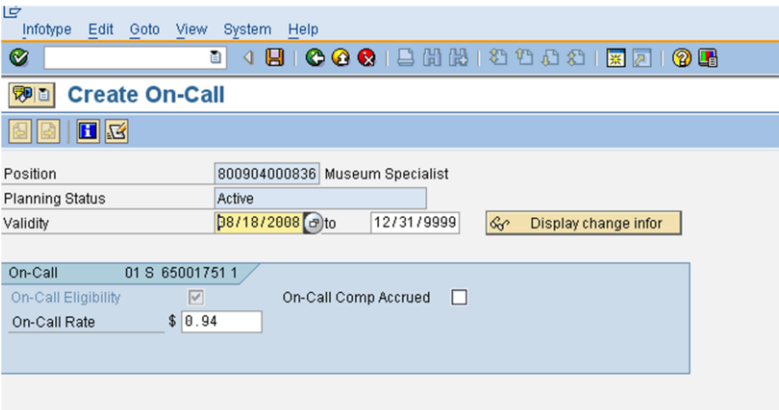
Holiday Premium Rate (IT9010)

IT9010 is only required if the Holiday Premium Rate is different than 50%.

OSP approved rates other than the default of 50% must be entered in the Rate field.

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Notes

On-Call (IT9011)

Positions eligible for On-Call compensation must have a valid IT9011 record.

The accrued box should be checked if the time is to be collected as On-Call comp time. The Rate field must be populated with the OSP approved on-call rate.
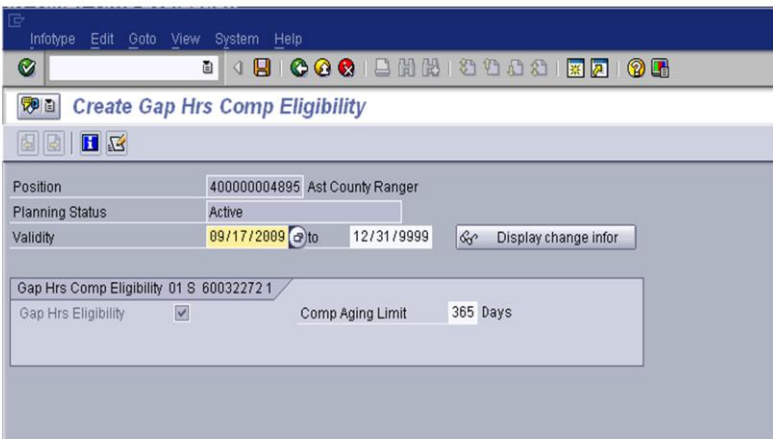
Callback (IT9012)

Positions eligible for Callback compensation must have a valid IT9012 record. The decision to pay versus comp time is determined by the Callback Accrual checkbox.

Notes

Gap Hours IT9017

Positions eligible for Gap Hours Comp must have a valid IT9017 record. The decision to pay versus comp time is determined by the Gap Hours Accrual checkbox.

Gap Hours are additional hours for Subject- FLSA employees. The "Additional hours" are those hours caught in the gap between the minimum hours of work required and the overtime threshold. These hours are currently being paid at an hour-for-hour rate for Subject-FLSA employees.

Notes

Knowledge Check – Lesson 5

T	F	Question
		1. Data entries made in one module do not affect other system components such as an employee's time, pay and benefits.
		2. PA infotypes apply to person and OM infotypes relate to the positions.
		3. OSC HR/Payroll is an integrated system.
		4. Some examples of OM infotypes include Actions (IT0000), Organizational Assignment (IT0001) and Personal Data (IT0002).
		5. Position infotypes such as gap hours, overtime compensation, and weekend shift premium affect an employee's time and payroll.
		6. Gap Hours Comp are additional hours that applies only to N-FLSA employees (not subject to the Fair Labor Standards Act).

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Notes

Lesson 5 Review

In this lesson, you learned to:

- Explain the OSC HR/Payroll system integration

- Identify PA infotypes that affect an employee's time, benefits and payroll

- Identify OM settings that affect the position and employee (holder) of the position

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Notes

Course Map – Organizational Management Overview

Lesson 1: PA Overview

Lesson 2: OM Concepts

Lesson 3: Displaying the Organizational Structure

Lesson 4: OM Processes and Reports

Lesson 5: Connecting the OSC HR/Payroll Dots

Lesson 6: Course Review

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Notes

Course Review

- In this course, you learned to:

  - Define Organizational Management (OM)
  - Identify components of the OM structure
  - Display the organizational structure in SAP for your agency/department
  - Identify OM reports
  - Connecting the OSC HR/Payroll Dots

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Notes

Questions

PARKING LOT

?

Slide 125

Notes

Next Steps

Monitor OSC HR/Payroll communication
- BEST Shared Services web site (especially the Updates tab)
  - URL: http://www.osc.nc.gov/BEST/index.html
- BEACON Training website: **What's New link**
  - URL: http://www.osc.nc.gov/beacon/training/whats_new.html

Review conceptual materials

Access BEACON Help
- Access from an SAP transaction
  - URL: http://help.mybeacon.nc.gov/beaconhelp

Practice what you've learned
  - URL: https://mybeacon.nc.gov
- Client 899
- Use your current NCID user name and password

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Notes

Continue to monitor updates on the BEACON University website for information regarding any future training that you are scheduled to attend.

Keep your training materials close by as a ready reference.

Want to practice what you have learned from your desk?

- Follow the link provided above to access the training client on the BEACON website. The training client is number 899. Your current NCID user name and password are used to access the practice environment.

Need transactional assistance?

- Remember to access BEACON Help when you need assistance in completing transactions. As stated above, the work instructions can be accessed either online or by clicking on BEACON Help from within an SAP transaction.

CONGRATULATIONS

You have completed the course

Please complete your course evaluation!

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Notes

Knowledge Check – Lesson 1

T	F	Question
	F	1. The Employee Subgroup arranges employees by their type of status, and establishes business rules for calculating leave.
	F	2. The Employee Group defines more detailed and specific processing for payroll calculation rules, for example, if employee is subject or not subject to FLSA.
T		3. The Payroll area describes the pay frequency and payroll cycle for each employee.
T		4. The company code is the highest level of the company structure as defined by Finance.
	F	5. The Personnel Area further defines employees in order to identify various working schedules so that Time Management can define groups of specific time entry rules.
	F	6. The Personnel Subarea is used to identify the specific agency for whom the employee works.

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Notes

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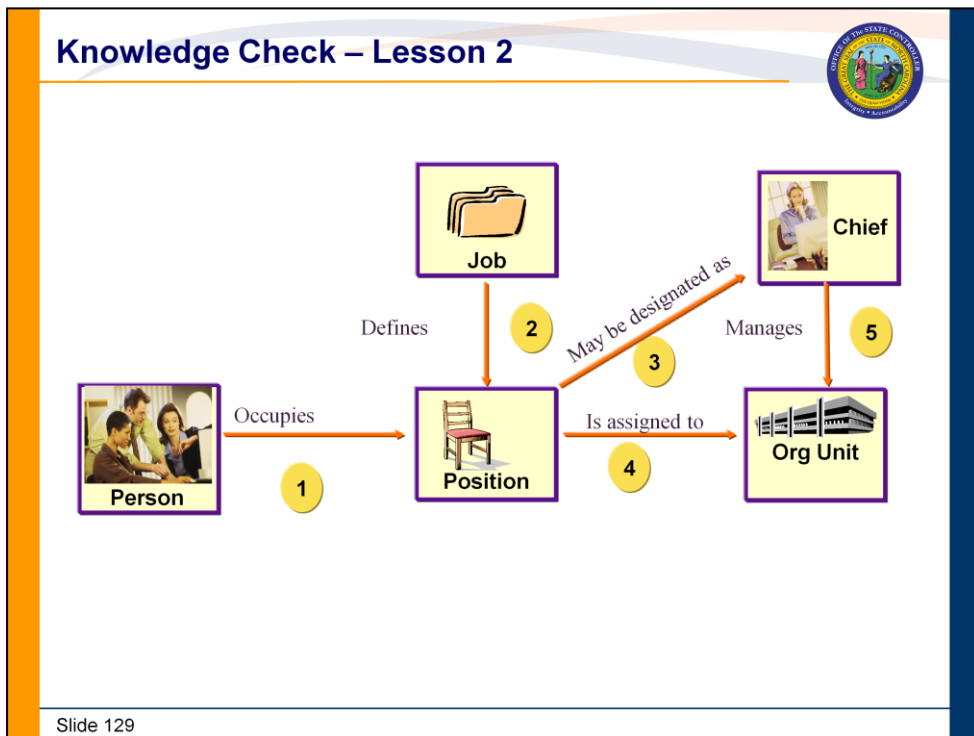
Notes

Answers

1. A person **occupies** (holds) a position.
2. A job **defines** a position.
3. A position **may be designated as** chief. In other words, a chief is also a position.
4. A positions **is assigned to** an org unit
5. A chief **manages** an org unit

Knowledge Check – Lesson 3

Terms	Definitions
2 - Company Code	The highest org unit of financial accounting (NC01)
8 - Personnel Area	Defines a specific agency within the State
1 - Chief Position	The position responsible for managing transactions within an org unit
7 - Person or Holder	Employees - persons are assigned directly to positions which are described by jobs and assigned to an org unit
5 - Org Unit	Represent any type of organizational entity found in the State and are assigned to cost objects
4 – Job	Provides a general classification of tasks that are routinely performed together and is used to describe several positions.
10 – Position	Described by a job and related to an org unit. May be held by one person or many people
9 - Personnel Structure	A description of the employee's position in the State.
3 - Enterprise Structure	Provides legal and reporting requirements, including the Company Code, Personnel Area, Personnel Subarea, and Cost Center
6 - Organizational Structure	Defines the hierarchical relationship between organizational management objects including org units, jobs, and positions

Slide 130

Notes

Knowledge Check – Lesson 5

T	F	Question
	F	1. Data entries made in one module do not affect other system components such as an employee's time, pay and benefits.
T		2. PA infotypes apply to person and OM infotypes relate to the positions.
T		3. OSC HR/Payroll is an integrated system.
	F	4. Some examples of OM infotypes include Actions (IT0000), Organizational Assignment (IT0001) and Personal Data (IT0002).
T		5. Position infotypes such as gap hours, overtime compensation, and weekend shift premium affect an employee's time and payroll.
	F	6. Gap Hours Comp are additional hours that only apply to N-FLSA employees (not subject to the Fair Labor Standards Act).

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Notes